



City of Appleton

225 N. Oneida Street
Appleton WI, 54911

Meeting Agenda - Final Library Board

Tuesday, November 15, 2022

4:30 PM

225 N. Oneida Street

1. Call meeting to order
2. Roll call of membership
3. Approval of minutes from previous meeting
[22-1469](#) October 18, 2022 Meeting Minutes

Attachments: [October 18 2022 Library Board Meeting Minutes.pdf](#)

Public Participation and Communication

Establish Order of the Day

5. Action Items

- [22-1470](#) Bill Register - October 2022
- Attachments:** [October 2022 Bill Register.pdf](#)
[MTD-Report-October-2022.pdf](#)
[APL Financial Cash Flow YTD-Oct-2022.pdf](#)
- [22-1471](#) November 2022 Budget Amendment
- Attachments:** [November 2022 Budget Amendment.pdf](#)
- [22-1472](#) United Way Compliance Documents 2021/2022
- Attachments:** [United Way Compliance Documents 2021-2022.pdf](#)
- [22-1473](#) 2023 Proposed Library Closed Dates
- Attachments:** [Proposed Closures 2023.pdf](#)

[22-1474](#) Report of the Personnel & Policy Committee

Attachments: [November 8 2022 Personnel & Policy Committee Meeting Minutes.pdf](#)
[Baker Tilly Memo Summary.pdf](#)
[HR Comp Memo.pdf](#)
[Salary Admin Policy \(1\).pdf](#)
[Seasonal Policy.pdf](#)
[Naming Opportunities Policy 11-2022 AMENDED \(Draft\).pdf](#)
[Seasonal Policy.pdf](#)

[22-1478](#) Library Director's 2022 End of Year Performance Evaluation

6. Information Items

A. Administrative Report

[22-1475](#) Library Building Project Update

Attachments: [Building Project Update November 2022.pdf](#)

[22-1476](#) City Budget Process Update

[22-1477](#) APL Hiring Process Update

[22-1479](#) Friends / F. P. Young Scholarship

[22-1480](#) Friends Grant Funded Program Summaries 3rd Quarter 2022

Attachments: [Friends Grant Funded Program Summaries 3rd Quarter 2022 FINAL.pdf](#)

B. President's Report

[22-1482](#) Trustee Development Innovation - Part 2: Staff

C. Staff Updates

[22-1483](#) Children's Program Updates

[22-1484](#) Community Partnerships Updates

Closed Session

The Board may meet in Closed Session pursuant to WI statute 19.85(f)(c) to discuss personnel matters and then resume meeting in Open Session.

7. Adjournment

Notice is hereby given that a quorum of the Common Council may be present during this meeting, although no Council action will be taken.

Reasonable Accommodations for Persons with Disabilities will be made upon Request and if Feasible.



City of Appleton

225 N. Oneida Street
Appleton WI, 54911

Meeting Minutes Library Board

Tuesday, October 18, 2022

4:30 PM

City Hall - 100 N. Appleton Street
6 A/B

1. Call meeting to order

Vice President Margret Mann called the meeting to order at 4:32pm

2. Roll call of membership

Others Present: Owen Anderson, Nicole Casner, Ann Cooksey, Tina Krueger, Alex Niemi, Colleen Rortvedt, Tasha Saecker, Nick Vande Castle, Maureen Ward

Present: 9 - Looker, Kellner, Exarhos, Mann, Nett, Van Zeeland, Keller, Brozek and Bunnow

Excused: 2 - Scheuerman and Sivasamy

3. Approval of minutes from previous meeting

[22-1309](#)

September 20, 2022 Meeting Minutes

Attachments: [September 20, 2022 Library Board Meeting Minutes.pdf](#)

Looker moved, seconded by Bunnow, that the September 20, 2022 Meeting Minutes be approved. Voice Vote. Motion Carried. (9-0)

4. Public Participation & Communication

Establish Order of the Day

Vice President Mann call for a motion to place Action Items 22-1310, 22-1311 and 22-1312 on a Consent Agenda.

Kellner moved, seconded by Bunnow to place Action Items 22-1310, 22-311 and 22-1312 on a Consent Agenda. Voice Vote. Motion Carried. (9-0)

5. Action Items

Looker moved, seconded by Kellner that the Consent Agenda be approved. Voice Vote. Motion Carried. (9-0)

[22-1310](#)

Bill Register - September 2022

Attachments: [September 2022 Bill Register.pdf](#)
[APL Financial Cash Flow YTD-Sept-2022.pdf](#)
[MTD-Report-Sept-2022.pdf](#)
[Friends Quarterly Report 9-2022.pdf](#)

This Report Action Item was approved

[22-1311](#)

October 2022 Budget Amendment

Attachments: [Oct 2022 Budget Amendment.pdf](#)

This Report Action Item was approved

[22-1312](#)

City Of Appleton Policy - Confined Space Entry

Attachments: [Confined Space Entry - 6-15-2022 Revision.pdf](#)

This Report Action Item was approved

6. Information Items

A. Administrative Report

[22-1313](#)

Library Building Project Update

Attachments: [October 2022 - Building Project FAQ.pdf](#)

[22-1314](#)

2023 City Budget Process Update

[22-1315](#)

APL Hiring Process Update

[22-1316](#)

City Library Collective Update

B. President's Report

[22-1317](#)

Trustee Development - Trustee Essentials Chapter 6: Evaluating the Library Director

Attachments: [Trustee Essentials Chapter 6 Evaluating The Library Director.pdf](#)

[22-1318](#)

Innovation Presentation - Pat Exarhos

[22-1319](#) Upcoming Committee Meeting - Personnel & Policy Committee
11/8/2022 10:30am

C. Staff Updates

[22-1320](#) Children's Program Updates

[22-1321](#) Community Partnerships Updates

7. Adjournment

**Exarhos moved, seconded by Keller that the meeting be adjourned. Voice
Vote. Motion Carried. (9-0)**

The meeting was adjourned at 5:11pm

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK	RUN	CHECK	DESCRIPTION
16010									Library Administration
16010	630100								Office Supplies
001583	UNITED STATES POSTAL	88624	0	2022	10	INV	P	15.12	pcard Postage Board Packe
002034	OFFICE DEPOT	87567	0	2022	10	INV	P	59.00	pcard Ball Point Pens, Sh
999990	VISTAPRINT	88599	0	2022	10	INV	P	38.99	pcard Business Cards - Ko
								ACCOUNT TOTAL	113.11
16010	630300								Memberships & Licenses
001198	SAM'S CLUB	88036	0	2022	10	INV	P	47.25	pcard Membership Renewal
								ACCOUNT TOTAL	47.25
16010	630700								Food & Provisions
999990	SOLEA MEXICAN GRILL	87936	0	2022	10	INV	P	75.00	pcard Refreshments for Ba
999990	HILL TOP BAKERY	88013	0	2022	10	INV	P	25.36	pcard HILL TOP BAKERY - S
999990	SQ *COPPER ROCK COFF	88706	0	2022	10	INV	P	45.48	pcard TAP October Meeting
								145.84	
								ACCOUNT TOTAL	145.84
16010	641200								Advertising
999990	DRI*SIGNS	88572	0	2022	10	INV	P	206.91	pcard Building Closed Sig
999990	LOOMLY	88600	0	2022	10	INV	P	714.00	pcard Social Media Conten
999990	EIG*CONSTANTCONTACT.	88665	0	2022	10	INV	P	1,050.00	pcard Promotional Email S
								1,970.91	
								ACCOUNT TOTAL	1,970.91
16010	641308								Cellular Phones
000250	CELLCOM APPLETON PCS	88037	0	2022	10	INV	P	103.75	pcard Cell Phones
								ACCOUNT TOTAL	103.75
16010	659900								Other Contracts/Obligation
001957	IMOBESTEG PIANO	22APL002	0	2022	10	INV	A	160.00	Grand Piano Qtr Tun
002229	STAR PROTECTION AND	203355	0	2022	10	INV	P	6,339.27	102622 556169 Security Guard
002883	US 2 BEHAVIORAL HEAL	10014	0	2022	10	INV	P	500.00	101222 556000 Friends/Trustee Ret
999990	SURVEYMONK* T	433502 88601	0	2022	10	INV	P	99.00	pcard Public Survey
								ACCOUNT TOTAL	7,098.27
								ORG 16010 TOTAL	9,479.13

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK	RUN	CHECK	DESCRIPTION
16021									Library Children's Services
16021	620100								Training/Conferences
001468	WISCONSIN ASSOCIATIO	88093	0	2022	10	INV	P	210.00	pcard WISCONSIN LIBRARY A
999990	KANSAS CITY MARRIOTT	88094	0	2022	10	INV	P	605.37	pcard ALSC - Hotel
								815.37	ACCOUNT TOTAL
16021	630100								Office Supplies
000003	A.R. LAWN CARE	88552	0	2022	10	INV	P	13.75	pcard October SAS
001983	AMAZON	87932	0	2022	10	INV	P	6.95	pcard STREAM Team Supplie
001983	AMAZON	87933	0	2022	10	INV	P	31.97	pcard STREAM Team Supplie
001983	AMAZON	87934	0	2022	10	INV	P	109.49	pcard STREAM Team Supplie
001983	AMAZON	88016	0	2022	10	INV	P	10.94	pcard STREAM Team Supplie
001983	AMAZON	88095	0	2022	10	INV	P	13.99	pcard Wrist Mouse Pads
001983	AMAZON	88553	0	2022	10	INV	P	15.90	pcard October SAS
001983	AMAZON	88554	0	2022	10	INV	P	17.00	pcard Fall SAS
001983	AMAZON	88555	0	2022	10	INV	P	85.33	pcard Fall SAS
001983	AMAZON	88586	0	2022	10	INV	P	14.18	pcard Fall SAS
001983	AMAZON	88587	0	2022	10	INV	P	61.46	pcard Fall SAS
001983	AMAZON	88588	0	2022	10	INV	P	76.41	pcard Glow in the Park
001983	AMAZON	88625	0	2022	10	INV	P	37.77	pcard Glow in the Park
001983	AMAZON	88626	0	2022	10	INV	P	77.98	pcard Glow in the Park
001983	AMAZON	88635	0	2022	10	INV	P	10.99	pcard Snowflake stickers
001983	AMAZON	88636	0	2022	10	INV	P	15.69	pcard Paper Bags for Mons
001983	AMAZON	88643	0	2022	10	INV	P	12.99	pcard Halloween pipe clea
001983	AMAZON	88644	0	2022	10	INV	P	19.98	pcard Monster Craft
001983	AMAZON	88645	0	2022	10	INV	P	45.82	pcard Prize Wheel
								664.84	
999990	THE HOME DEPOT #4928	88710	0	2022	10	INV	P	169.00	pcard Shelving Unit
								847.59	ACCOUNT TOTAL
								1,662.96	ORG 16021 TOTAL
16023									Library Public Services
16023	630100								Office Supplies
001034	OUTAGAMIE WAUPACA LI	4015	0	2022	10	INV	P	70.00	101222 555978 Compliance Site Lic
999990	VISTAPRINT	88599	0	2022	10	INV	P	39.00	pcard Business Cards - Ko
								109.00	ACCOUNT TOTAL
								109.00	ORG 16023 TOTAL
16024									Library Community Partnerships
16024	620100								Training/Conferences
999990	TRADEWINDS ISLAND RE	88019	0	2022	10	INV	P	-220.35	pcard Refund for Canceled

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10		ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK	RUN	CHECK	DESCRIPTION	
999990	CONCOURSE HOTEL	88620	0	2022 10	INV	P	262.00	pcard			Training/Travel - L	
999990	CONCOURSE HOTEL	88621	0	2022 10	INV	P	15.00	pcard			Training/Travel - P	
							56.65					
ACCOUNT TOTAL							56.65					
16024	630100				Office Supplies							
001983	AMAZON	88053	0	2022 10	INV	P	1,396.00	pcard			Community Powered I	
999990	WAL-MART #2958	88017	0	2022 10	INV	P	3.32	pcard			Plates for Hispanic	
999990	WAL-MART #2958	88018	0	2022 10	INV	P	3.32	pcard			Plates for Hispanic	
							6.64					
ACCOUNT TOTAL							1,402.64					
16024	659900				Other Contracts/Obligation							
000511	FOX CITIES BOOK FEST 198		0	2022 10	INV	A	2,000.00				Fox Cities Book Fes	
001034	OUTAGAMIE WAUPACA LI 4015		0	2022 10	INV	P	1,242.00	101222		555978	Compliance Site Lic	
002971	CHRISTINA BEAIRD	Beaird 2022	0	2022 10	INV	P	150.00	101222		555930	Find Your Ancestors	
999990	PAYPAL *SOKOLSOKOLI	87573	0	2022 10	INV	P	50.00	pcard			Find Your Ancestors	
ACCOUNT TOTAL							3,442.00					
ORG 16024 TOTAL							4,901.29					
16031					Library Building Operations							
16031	630600				Building Maint./Janitorial							
001421	VALLEY PEST CONTROL,	1354928	0	2022 10	INV	P	50.00	101922		556103	Oct 2022 Pest Contr	
002818	ARAMARK	88038	0	2022 10	INV	P	79.31	pcard			Floor Mats, Towels	
ACCOUNT TOTAL							129.31					
16031	641301				Electric							
001575	WE ENERGIES	701172433-00271 0922	0	2022 10	INV	P	8,307.89	100522		555909	00262	
ACCOUNT TOTAL							8,307.89					
16031	641600				Build Repairs & Maint							
999990	THE HOME DEPOT #4928	88709	0	2022 10	INV	P	47.34	pcard			Outlet Plugs, Refle	
ACCOUNT TOTAL							47.34					
16031	650200				Leases							
001593	PFEFFERLE COMPANIES	OCT 2022	0	2022 10	INV	P	4,139.56	102622		556160	Oct 2022 Electric S	
001593	PFEFFERLE COMPANIES	OCT 2022	0	2022 10	INV	P	243.35	102622		556160	10/22 GAS Kensington	
001593	PFEFFERLE COMPANIES	OCT2022	0	2022 10	INV	P	25.62	101922		556071	October 2022 Trash	

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD:	2022/10 TO 2022/10													
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK RUN	CHECK	DESCRIPTION						
												4,408.53		
												ACCOUNT TOTAL	4,408.53	
			ORG 16031	TOTAL								12,893.07		
16032													Library Materials Management	
16032	503500												Other Reimbursements	
001447	VILLAGE OF LITTLE CH	October 2022	2022	10	INV P			13.95	102622				556182 Patron Material Rei	
999998	CATHERINE SCULLION	Scullion 2022	2022	10	INV P			20.00	100522				555870 PATRON MATERIAL REI	
													ACCOUNT TOTAL	33.95
16032	630100												Office Supplies	
000185	BIBLIOTHECA, LLC	INV-US58759	2022	10	INV P			6,306.00	101922				556026 RFID Tags INV-US5	
001983	AMAZON	87570	2022	10	INV P			8.28	pcard				Label tags for Chil	
001983	AMAZON	88042	2022	10	INV P			38.48	pcard				DVD Cases	
001983	AMAZON	88043	2022	10	INV P			13.85	pcard				DVD Cases	
001983	AMAZON	88044	2022	10	INV P			22.21	pcard				DVD Cases	
								82.82						
999990	NATIONALAUD	87569	2022	10	INV P			154.59	pcard				Audiobook CD sleeve	
999990	ONLINE LABELS, INC.	88040	2022	10	INV P			232.72	pcard				Spine labels	
999990	CCI SOLUTIONS	88041	2022	10	INV P			260.46	pcard				Audiobook Cases	
								647.77						
													ACCOUNT TOTAL	7,036.59
16032	631500												Books & Library Materials	
000468	FINDAWAY WORLD, LLC	88606	2022	10	INV P			104.98	pcard				375907	
000468	FINDAWAY WORLD, LLC	88607	2022	10	INV P			80.98	pcard				375906	
								185.96						
000550	GALE / CENGAGE LEARN	88056	2022	10	INV P			4,432.05	pcard				79340740	
000870	MERGENT, INC.	88627	2022	10	INV P			403.00	pcard				1673021130	
000870	MERGENT, INC.	88628	2022	10	INV P			130.00	pcard				1673021131	
								533.00						
000889	MIDWEST TAPE	87540	2022	10	INV P			644.46	pcard				502718187	
000889	MIDWEST TAPE	87999	2022	10	INV P			974.66	pcard				502744967	
000889	MIDWEST TAPE	88604	2022	10	INV P			1,050.96	pcard				502782317 50280558	
000889	MIDWEST TAPE	88605	2022	10	INV P			8,147.78	pcard				502755984	
000889	MIDWEST TAPE	88671	2022	10	INV P			948.36	pcard				502817874 50283949	

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK RUN	CHECK	DESCRIPTION	
						11,766.22			
001265	SOO LINE HISTORICAL	88702	0	2022 10	INV P	45.50	pcard	3827	
001983	AMAZON	87574	0	2022 10	INV P	49.95	pcard	113-4100683-8042606	
001983	AMAZON	87575	0	2022 10	INV P	20.99	pcard	113-2745805-4779468	
001983	AMAZON	88059	0	2022 10	INV P	76.39	pcard	113-7123774-2956244	
001983	AMAZON	88060	0	2022 10	INV P	21.73	pcard	112-0445305-9251458	
001983	AMAZON	88061	0	2022 10	INV P	28.07	pcard	113-4141803-2825843	
001983	AMAZON	88629	0	2022 10	INV P	23.94	pcard	113-7881334-6373063	
001983	AMAZON	88698	0	2022 10	INV P	22.42	pcard	113-3299119-7380263	
001983	AMAZON	88699	0	2022 10	INV P	13.99	pcard	113-7900300-2475466	
001983	AMAZON	88700	0	2022 10	INV P	43.65	pcard	113-6287417-6918611	
001983	AMAZON	88701	0	2022 10	INV P	108.69	pcard	113-9212803-9378630	
						409.82			
002396	INGRAM LIBRARY SERV	87541	0	2022 10	INV P	-5.39	pcard	71675435	
002396	INGRAM LIBRARY SERV	87542	0	2022 10	INV P	583.06	pcard	71682349	
002396	INGRAM LIBRARY SERV	87543	0	2022 10	INV P	654.15	pcard	71708568	
002396	INGRAM LIBRARY SERV	87544	0	2022 10	INV P	502.76	pcard	71749813	
002396	INGRAM LIBRARY SERV	87545	0	2022 10	INV P	1,330.41	pcard	71740705	
002396	INGRAM LIBRARY SERV	87546	0	2022 10	INV P	866.00	pcard	71789727	
002396	INGRAM LIBRARY SERV	87547	0	2022 10	INV P	390.77	pcard	71789728	
002396	INGRAM LIBRARY SERV	87548	0	2022 10	INV P	1,402.88	pcard	00669c022353574	
002396	INGRAM LIBRARY SERV	88000	0	2022 10	INV P	189.01	pcard	71814932	
002396	INGRAM LIBRARY SERV	88001	0	2022 10	INV P	264.20	pcard	71825891	
002396	INGRAM LIBRARY SERV	88002	0	2022 10	INV P	274.44	pcard	71825890	
002396	INGRAM LIBRARY SERV	88003	0	2022 10	INV P	5,000.00	pcard	71816089	
002396	INGRAM LIBRARY SERV	88004	0	2022 10	INV P	498.87	pcard	71840332	
002396	INGRAM LIBRARY SERV	88005	0	2022 10	INV P	249.84	pcard	71855710	
002396	INGRAM LIBRARY SERV	88006	0	2022 10	INV P	233.25	pcard	71868172	
002396	INGRAM LIBRARY SERV	88007	0	2022 10	INV P	1,287.81	pcard	71876767	
002396	INGRAM LIBRARY SERV	88008	0	2022 10	INV P	705.17	pcard	71918702	
002396	INGRAM LIBRARY SERV	88009	0	2022 10	INV P	458.89	pcard	71930051	
002396	INGRAM LIBRARY SERV	88010	0	2022 10	INV P	455.81	pcard	71930052	
002396	INGRAM LIBRARY SERV	88608	0	2022 10	INV P	604.02	pcard	71953904	
002396	INGRAM LIBRARY SERV	88609	0	2022 10	INV P	849.61	pcard	71974894	
002396	INGRAM LIBRARY SERV	88610	0	2022 10	INV P	483.36	pcard	71996783	
002396	INGRAM LIBRARY SERV	88611	0	2022 10	INV P	360.96	pcard	71996784	
002396	INGRAM LIBRARY SERV	88612	0	2022 10	INV P	1,018.26	pcard	72003689	
002396	INGRAM LIBRARY SERV	88613	0	2022 10	INV P	193.93	pcard	72020502	
002396	INGRAM LIBRARY SERV	88614	0	2022 10	INV P	351.14	pcard	72020501	
002396	INGRAM LIBRARY SERV	88615	0	2022 10	INV P	447.87	pcard	72043468	
002396	INGRAM LIBRARY SERV	88616	0	2022 10	INV P	348.01	pcard	72043469	
002396	INGRAM LIBRARY SERV	88617	0	2022 10	INV P	517.87	pcard	72055685	
002396	INGRAM LIBRARY SERV	88672	0	2022 10	INV P	461.66	pcard	72066432	
002396	INGRAM LIBRARY SERV	88673	0	2022 10	INV P	327.85	pcard	72088210	
002396	INGRAM LIBRARY SERV	88674	0	2022 10	INV P	880.28	pcard	72126027	
002396	INGRAM LIBRARY SERV	88675	0	2022 10	INV P	1,854.89	pcard	72143205	
002396	INGRAM LIBRARY SERV	88676	0	2022 10	INV P	339.54	pcard	78178203	

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10		ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK RUN	CHECK	DESCRIPTION	
002396	INGRAM LIBRARY SERV	88677	0	2022 10	INV	P	11.09		pcard	72167676	
002396	INGRAM LIBRARY SERV	88678	0	2022 10	INV	P	739.07		pcard	72167675	
002396	INGRAM LIBRARY SERV	88679	0	2022 10	INV	P	336.22		pcard	72167677	
							25,467.56				
002830	KANOPY, INC	316788	0	2022 10	INV	P	323.00	100522		555860 Inv. 316788	
999990	SUNSET PUBLISHING CO	88054	0	2022 10	INV	P	24.95		pcard	221005SUNSE	
999990	THOMSON WEST*TCD	88055	0	2022 10	INV	P	1,076.05		pcard	847102390	
999990	DATABASE LLC	88057	0	2022 10	INV	P	7,704.00		pcard	123820	
999990	DATA AXLE-CITYDIRECT	88058	0	2022 10	INV	P	342.40		pcard	10004021930	
							9,147.40				
ACCOUNT TOTAL							52,310.51				
16032	659900	Other Contracts/Obligation									
001398	UNIQUE MANAGEMENT SE	6103499	0	2022 10	INV	P	1,063.80	101222		555997 Collection Agency	
001398	UNIQUE MANAGEMENT SE	6105457	0	2022 10	INV	P	187.15	101222		555997 Collection Agency -	
							1,250.95				
ACCOUNT TOTAL							1,250.95				
ORG 16032 TOTAL							60,632.00				
16033	632700	Library Network Services									
000229	CAMERA CORNER	88729	0	2022 10	INV	P	5,182.00		pcard	Camera Removal & In	
000362	DELL MARKETING L.P.	87583	0	2022 10	INV	P	78.00		pcard	Batteries for Noteb	
001619	CDW GOVERNMENT, INC.	88082	0	2022 10	INV	P	1,849.60		pcard	Chromebook	
001983	AMAZON	88640	0	2022 10	INV	P	57.47		pcard	Network Cables, Ada	
999990	DMI* DELL K-12/GOVT	87581	0	2022 10	INV	P	371.00		pcard	Monitors	
999990	DMI* DELL K-12/GOVT	88077	0	2022 10	INV	P	278.00		pcard	Monitor	
999990	THE HOME DEPOT #4928	88639	0	2022 10	INV	P	5.87		pcard	Batteries	
							654.87				
ACCOUNT TOTAL							7,821.94				
16033	641800	Equip Repairs & Maint									
000911	MODERN BUSINESS MACH	IN3760663	0	2022 10	INV	P	181.32	101222		555970 Copier Contract - M	
000978	NIELSON COMMUNICATIO	AR27300	0	2022 10	INV	P	1,147.20	101922		556067 Batteries	
ACCOUNT TOTAL							1,328.52				

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2022/10 TO 2022/10									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	CHECK	RUN	CHECK	DESCRIPTION
16033 659900					Other Contracts/Obligation				
001619 CDW GOVERNMENT, INC.	88641	0	2022 10	INV	P	2,688.00	pcard		Renewal - Email Arc
001961 WELLS FARGO FINANCIA	5022023747	0	2022 10	INV	P	399.74	101922	556107	Copier Lease
ACCOUNT TOTAL						3,087.74			
16033 681500					Software Acquisition				
002259 DEMCO SOFTWARE	INV00014302	0	2022 10	INV	P	2,412.78	101922	556038	Evanced Events Cale
002386 THE QUIPU GROUP, LLC	2023	0	2022 10	INV	P	3,605.00	100522	555901	PITS Subscription R
999990 MSFT * E0700KHV6M	87582	0	2022 10	INV	P	79.20	pcard		VISIO Renewal
ACCOUNT TOTAL						6,096.98			
ORG 16033 TOTAL						18,335.18			
FUND 100 General Fund						TOTAL:			108,012.63

** END OF REPORT - Generated by Maureen Ward **



2020-2022 MTD EXPENDITURES	October 2020-2022 comparisons		
	2020	2021	2022
ACCOUNT DESCRIPTION	MTD ACTUAL	MTD ACTUAL	
423200 Library Grants & Aids	\$0.00	\$0.00	\$0.00
480100 General Charges for Service	\$478.98	\$114.03	\$37.41
500100 Fees & Commissions	\$0.00	(\$1.00)	\$0.00
501500 Rental of City Property	\$0.00	\$0.00	\$0.00
502000 Donations & Memorials	\$0.00	\$21.94	\$50.95
503500 Other Reimbursements	\$547.74	\$4,711.19	\$10,148.46
MTD-Total Revenue	\$1,026.72	\$4,846.16	\$10,236.82

610100 Regular Salaries	(\$247,776.01)	(\$153,071.35)	(\$156,533.84)
610400 Call Time Wages	\$0.00	\$0.00	\$0.00
610500 Overtime Wages	(\$47.81)	\$0.00	(\$10.93)
610800 Part-Time Wages	(\$23,004.25)	(\$19,848.85)	(\$17,184.31)
611400 Sick Pay	(\$1,533.17)	(\$1,449.25)	\$0.00
611500 Vacation Pay	(\$19,614.68)	(\$18,419.74)	(\$18,716.76)
615000 Fringes	\$0.00	\$0.00	\$0.00
615100 FICA	(\$19,091.27)	(\$11,958.36)	(\$12,223.03)
615200 Retirement	(\$16,975.72)	(\$10,943.89)	(\$10,754.17)
615301 Health Insurance	(\$38,611.29)	(\$39,610.47)	(\$37,716.07)
615302 Dental Insurance	(\$2,998.46)	(\$3,005.44)	(\$2,925.07)
615400 Life Insurance	(\$51.58)	(\$64.30)	(\$74.10)
620100 Training/Conferences	(\$1,910.00)	(\$410.00)	(\$1,160.68)
620200 Mileage Reimbursement		(\$222.00)	(\$387.00)
620600 Parking Permits	(\$3.00)	\$0.00	(\$48.34)
630100 Office Supplies	(\$2,333.89)	(\$2,302.02)	(\$11,317.82)
630300 Memberships & Licenses	\$0.00	(\$239.25)	(\$47.25)
630500 Awards & Recognition	(\$182.25)	(\$30.19)	\$0.00
630600 Building Maint./Janitorial	(\$265.58)	(\$602.56)	(\$110.77)
630700 Food & Provisions	(\$84.25)	\$0.00	(\$186.15)
630902 Tools & Instruments	\$0.00	\$0.00	\$0.00
631500 Books & Library Materials	(\$70,744.58)	(\$56,563.92)	(\$52,310.51)
632001 City Copy Charges	\$0.00	\$0.00	\$0.00
632002 Outside Printing	(\$612.50)	\$0.00	\$0.00
632101 Uniforms	\$0.00	\$0.00	\$0.00
632300 Safety Supplies	\$0.00	\$0.00	\$0.00
632700 Miscellaneous Equipment	(\$9,352.67)	(\$13.00)	(\$7,821.94)
640700 Solid Waste/Recycling Pickup	(\$324.00)	(\$648.00)	(\$404.88)
641200 Advertising	(\$1,085.99)	(\$785.72)	(\$2,273.14)
641301 Electric	(\$7,177.95)	(\$8,849.96)	(\$8,307.89)
641302 Gas	(\$972.84)	(\$2,286.66)	\$0.00
641303 Water	\$0.00	\$0.00	\$0.00
641304 Sewer	\$0.00	\$0.00	\$0.00
641306 Stormwater	\$0.00	\$0.00	\$0.00
641307 Telephone	(\$276.12)	(\$279.92)	(\$285.95)
641308 Cellular Phones	(\$95.00)	(\$370.91)	(\$103.75)
641600 Build Repairs & Maint	\$0.00	\$0.00	(\$47.34)
641800 Equip Repairs & Maint	(\$7,966.04)	(\$1,011.46)	(\$1,328.52)
642000 Facilities Charges	(\$21,417.91)	(\$11,133.70)	(\$5,901.63)
650200 Leases		\$0.00	(\$4,408.53)
659900 Other Contracts/Obligation	(\$620.00)	(\$11,967.20)	(\$14,878.96)
681500 Software Acquisition	\$0.00	(\$2,297.89)	(\$6,096.98)
MTD Total Expenditures	(\$495,128.81)	(\$358,386.01)	(\$373,566.31)



Appleton Public Library Cash Flow Report OCT-2022 Year to Date

GL Account	ACCOUNT DESCRIPTION	ORIGINAL APPROP	REVISED BUDGET	JAN ACTUAL	FEB ACTUAL	MAR ACTUAL	APR ACTUAL	MAY ACTUAL	JUNE ACTUAL	JULY ACTUAL	AUG ACTUAL	SEPT ACTUAL	OCT ACTUAL	YTD TOTAL	% USED
423200	Library Grants & Aids	\$1,063,001.00	\$1,063,001.00	\$0.00	\$0.00	\$0.00	\$0.00	\$576,312.50	\$0.00	\$0.00	\$0.00	\$486,688.50	\$0.00	\$1,063,001.00	100.0%
480100	General Charges for Service	\$0.00	\$0.00	\$52.85	\$48.03	\$97.63	\$83.29	\$31.80	\$56.00	\$131.07	\$33.82	\$108.86	\$37.41	\$680.76	100.0%
500100	Fees & Commissions	\$600.00	\$600.00	\$121.97	(\$4.10)	\$112.78	\$27.87	\$34.36	(\$3.82)	\$69.23	\$0.00	\$0.00	\$0.00	\$358.29	59.7%
501500	Rental of City Property	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,440.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,440.00	100.0%
502000	Donations & Memorials	\$0.00	\$0.00	\$0.32	\$80.35	\$0.70	\$1.50	\$0.00	\$0.01	\$1.83	\$4.16	\$1.19	\$50.95	\$141.01	100.0%
503500	Other Reimbursements	\$43,900.00	\$122,756.00	\$1,766.70	\$2,710.20	\$41,914.37	\$28,956.61	\$1,221.96	\$1,327.81	\$12,452.39	\$8,909.58	\$3,290.75	\$10,148.46	\$112,698.83	91.8%
Total Revenue		\$1,107,501.00	\$1,186,357.00	\$1,941.84	\$2,834.48	\$42,125.48	\$35,509.27	\$577,600.62	\$1,380.00	\$12,654.52	\$8,947.56	\$490,089.30	\$10,236.82	\$1,183,319.89	99.7%

Expense	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	YTD TOTAL	% USED			
610100 Regular Salaries	(\$2,322,874.00)	(\$2,322,874.00)	(\$83,283.51)	(\$168,976.32)	(\$247,492.05)	(\$172,831.61)	(\$174,205.93)	(\$166,871.46)	(\$156,518.64)	(\$151,359.53)	(\$234,829.66)	(\$156,533.84)	(\$1,712,902.55)	73.7%	
610400 Call Time Wages	\$0.00	\$0.00	(\$200.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$200.00)	100.0%	
610500 Overtime Wages	\$0.00	\$0.00	\$0.00	\$0.00	(\$258.30)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$10.93)	(\$269.23)	100.0%	
610800 Part-Time Wages	(\$191,499.00)	(\$197,499.00)	(\$9,318.19)	(\$18,939.47)	(\$29,964.89)	(\$14,003.18)	(\$2,463.35)	(\$15,617.47)	(\$17,379.07)	(\$18,345.67)	(\$25,076.56)	(\$17,184.31)	(\$168,292.16)	85.2%	
611400 Sick Pay	\$0.00	\$0.00	(\$3,180.97)	(\$1,264.44)	(\$529.66)	(\$455.46)	(\$1,018.40)	(\$173.08)	\$0.00	(\$510.71)	\$0.00	\$0.00	(\$7,132.72)	100.0%	
611500 Vacation Pay	\$0.00	\$0.00	(\$4,628.74)	(\$8,623.93)	(\$19,860.61)	(\$8,296.14)	(\$6,696.20)	(\$13,849.64)	(\$22,814.78)	(\$26,117.68)	(\$29,232.01)	(\$18,716.76)	(\$158,836.49)	100.0%	
615000 Fringes	(\$819,743.00)	(\$819,743.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%	
615100 FICA	\$0.00	\$0.00	(\$12,389.47)	(\$12,453.44)	(\$19,172.76)	(\$12,624.16)	(\$12,431.94)	(\$12,514.65)	(\$12,459.06)	(\$12,538.42)	(\$18,825.93)	(\$12,223.03)	(\$137,632.86)	100.0%	
615200 Retirement	\$0.00	\$0.00	(\$10,921.04)	(\$10,941.80)	(\$16,470.58)	(\$11,139.63)	(\$11,105.51)	(\$11,040.61)	(\$10,987.56)	(\$10,925.94)	(\$16,156.07)	(\$10,754.17)	(\$120,442.91)	100.0%	
615301 Health Insurance	\$0.00	\$0.00	(\$19,454.35)	(\$37,785.21)	(\$37,807.23)	(\$38,092.93)	(\$38,933.16)	(\$38,648.48)	(\$38,832.77)	(\$38,870.46)	(\$37,528.10)	(\$37,716.07)	(\$363,668.76)	100.0%	
615302 Dental Insurance	\$0.00	\$0.00	(\$1,535.97)	(\$2,965.05)	(\$2,965.04)	(\$2,984.68)	(\$3,005.02)	(\$2,984.58)	(\$2,998.51)	(\$3,002.76)	(\$2,911.23)	(\$2,925.07)	(\$28,277.91)	100.0%	
615400 Life Insurance	\$0.00	\$0.00	(\$72.70)	(\$74.30)	(\$74.30)	(\$74.30)	(\$79.00)	(\$81.40)	(\$79.80)	(\$78.53)	(\$72.40)	(\$74.10)	(\$760.83)	100.0%	
Personnel Services		(\$3,334,116.00)	(\$3,340,116.00)	(\$144,984.94)	(\$262,023.96)	(\$374,595.42)	(\$260,502.09)	(\$249,938.51)	(\$261,781.37)	(\$262,070.19)	(\$261,749.70)	(\$364,631.96)	(\$256,138.28)	(\$2,698,416.42)	80.8%

Expense	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	YTD TOTAL	% USED		
620100 Training/Conferences	(\$23,234.00)	(\$26,234.00)	(\$628.76)	(\$152.59)	(\$92.59)	(\$3,399.21)	(\$1,273.54)	(\$874.00)	(\$2,110.00)	(\$2,343.99)	(\$2,321.07)	(\$1,160.68)	(\$14,356.43)	54.7%
620200 Mileage Reimbursement	\$0.00	\$0.00	(\$180.00)	(\$180.00)	(\$180.00)	(\$192.00)	(\$282.00)	(\$282.00)	(\$222.00)	(\$1,257.00)	(\$387.00)	(\$387.00)	(\$3,549.00)	100.0%
620600 Parking Permits	(\$12,000.00)	(\$12,000.00)	(\$1,820.00)	\$0.00	(\$1,820.00)	(\$1,855.00)	(\$1,260.00)	(\$1,540.00)	\$0.00	(\$543.01)	(\$48.34)	(\$48.34)	(\$8,886.35)	74.1%
630100 Office Supplies	(\$39,676.00)	(\$61,678.00)	(\$785.39)	(\$1,665.33)	(\$1,673.91)	(\$332.59)	(\$2,014.28)	(\$6,840.12)	(\$1,434.39)	(\$2,341.87)	(\$8,153.08)	(\$11,317.82)	(\$36,558.78)	59.3%
630300 Memberships & Licenses	(\$2,200.00)	(\$2,200.00)	(\$475.00)	(\$300.00)	(\$400.00)	\$0.00	\$0.00	\$0.00	\$0.00	(\$1,000.00)	(\$164.00)	(\$47.25)	(\$2,386.25)	108.5%
630500 Awards & Recognition	(\$850.00)	(\$1,850.00)	(\$87.53)	(\$60.95)	\$0.00	(\$100.00)	(\$71.98)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$320.46)	17.3%
630600 Building Maint./Janitorial	(\$7,000.00)	(\$7,000.00)	\$0.00	(\$78.68)	(\$184.41)	(\$881.86)	(\$928.06)	\$0.00	\$0.00	(\$1,749.74)	(\$1,166.07)	(\$110.77)	(\$5,099.59)	72.9%
630700 Food & Provisions	(\$1,135.00)	(\$3,071.00)	(\$12.00)	\$0.00	(\$230.20)	(\$803.95)	(\$578.21)	(\$35.81)	(\$137.12)	(\$155.44)	(\$157.10)	(\$186.15)	(\$2,295.98)	74.8%
630902 Tools & Instruments	(\$150.00)	(\$150.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%
631500 Books & Library Materials	(\$475,000.00)	(\$513,429.00)	(\$42,557.13)	(\$48,877.14)	(\$16,513.05)	(\$25,294.50)	(\$12,828.34)	(\$27,900.09)	(\$19,208.85)	(\$22,730.79)	(\$65,296.81)	(\$52,310.51)	(\$333,517.21)	65.0%
632001 City Copy Charges	(\$100.00)	(\$100.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0%
632002 Outside Printing	\$0.00	(\$1,200.00)	\$0.00	\$0.00	(\$479.63)	(\$194.32)	(\$39.22)	(\$251.58)	(\$132.64)	(\$34.62)	\$0.00	\$0.00	(\$1,132.01)	94.3%
632300 Safety Supplies	(\$550.00)	(\$550.00)	\$0.00	\$0.00	\$0.00	(\$110.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$110.00)	20.0%
632700 Miscellaneous Equipment	(\$53,630.00)	(\$94,368.00)	\$0.00	(\$3,250.57)	(\$4,300.23)	\$0.00	(\$403.50)	\$0.00	\$0.00	(\$6,307.52)	(\$3,100.60)	(\$7,821.94)	(\$25,184.36)	26.7%
640700 Solid Waste/Recycling Pickup	(\$4,125.00)	(\$4,125.00)	\$0.00	(\$665.76)	\$0.00	(\$732.88)	(\$1,140.76)	(\$884.91)	\$0.00	(\$404.88)	(\$404.88)	(\$404.88)	(\$4,638.95)	112.5%
641200 Advertising	(\$1,288.00)	(\$19,288.00)	(\$350.84)	\$0.00	(\$130.00)	(\$1,360.22)	(\$1,449.63)	(\$294.29)	(\$177.61)	(\$285.19)	\$0.00	(\$2,273.14)	(\$6,320.92)	32.8%
641301 Electric	(\$24,778.00)	(\$24,778.00)	(\$6,742.00)	\$0.00	(\$13,625.90)	\$0.00	(\$6,742.43)	(\$12,895.11)	(\$23,146.31)	\$0.00	(\$6,945.72)	(\$8,307.89)	(\$78,405.36)	316.4%
641302 Gas	(\$4,283.00)	(\$4,283.00)	(\$4,462.50)	\$0.00	(\$8,208.31)	\$0.00	(\$2,956.09)	(\$8,691.92)	(\$4,280.48)	(\$1,141.36)	(\$207.47)	\$0.00	(\$29,948.13)	699.2%
641303 Water	(\$5,125.00)	(\$5,125.00)	\$0.00	(\$703.62)	\$0.00	\$0.00	(\$812.46)	\$0.00	\$0.00	(\$697.54)	\$0.00	\$0.00	(\$2,213.62)	43.2%
641304 Sewer	(\$2,114.00)	(\$2,114.00)	\$0.00	(\$356.93)	\$0.00	\$0.00	(\$438.00)	\$0.00	\$0.00	(\$367.13)	\$0.00	\$0.00	(\$1,162.06)	55.0%
641306 Stormwater	(\$3,700.00)	(\$3,700.00)	\$0.00	(\$793.97)	\$0.00	\$0.00	(\$776.71)	\$0.00	\$0.00	(\$785.34)	\$0.00	\$0.00	(\$2,356.02)	63.7%
641307 Telephone	(\$2,948.00)	(\$2,948.00)	(\$295.55)	(\$288.12)	(\$285.80)	(\$286.84)	(\$284.92)	(\$286.79)	(\$290.87)	(\$289.09)	(\$293.18)	(\$285.95)	(\$2,887.11)	97.9%

641308	Cellular Phones	(\$1,600.00)	(\$1,600.00)	(\$206.72)	\$0.00	(\$83.75)	\$0.00	(\$166.00)	\$0.00	\$0.00	(\$411.91)	(\$103.75)	(\$103.75)	(\$1,075.88)	67.2%
641600	Build Repairs & Maint	(\$2,000.00)	(\$2,000.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$465.15)	\$0.00	(\$47.34)	(\$512.49)	25.6%
641800	Equip Repairs & Maint	(\$79,953.00)	(\$79,953.00)	(\$18,518.84)	(\$261.44)	(\$2,010.16)	(\$1,253.96)	(\$9,254.44)	(\$421.73)	(\$605.25)	(\$1,922.76)	(\$509.52)	(\$1,328.52)	(\$36,086.62)	45.1%
642000	Facilities Charges	(\$100,000.00)	(\$160,825.00)	(\$12,912.06)	(\$12,862.62)	(\$34,819.15)	(\$15,419.51)	(\$44,129.05)	(\$5,283.38)	\$0.00	(\$61.23)	(\$9,598.53)	(\$5,901.63)	(\$140,987.16)	87.7%
650200	Leases	(\$258,663.00)	(\$492,910.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$12,998.90)	\$0.00	(\$41,697.95)	(\$17,468.29)	(\$4,408.53)	(\$76,573.67)	15.5%
659900	Other Contracts/Obligation	(\$87,605.00)	(\$149,555.00)	(\$6,933.85)	(\$27,133.27)	(\$72,204.52)	(\$900.00)	(\$12,214.78)	(\$2,397.90)	(\$4,037.31)	(\$34,921.23)	(\$15,166.51)	(\$14,878.96)	(\$190,788.33)	127.6%
681500	Software Acquisition	(\$4,498.00)	(\$4,498.00)	(\$2,039.50)	(\$5,780.31)	(\$40.00)	(\$782.50)	\$0.00	\$0.00	\$0.00	(\$13,352.33)	(\$1,456.50)	(\$6,096.98)	(\$29,548.12)	656.9%
Operating Expense		(\$1,198,205.00)	(\$1,681,532.00)	(\$99,007.67)	(\$103,411.30)	(\$157,281.61)	(\$53,899.34)	(\$100,044.40)	(\$81,878.53)	(\$55,782.83)	(\$134,724.06)	(\$133,443.09)	(\$117,428.03)	(\$1,036,900.86)	61.7%
Personnel Services		(\$3,334,116.00)	(\$3,340,116.00)	(\$144,984.94)	(\$262,023.96)	(\$374,595.42)	(\$260,502.09)	(\$249,938.51)	(\$261,781.37)	(\$262,070.19)	(\$261,749.70)	(\$364,631.96)	(\$256,138.28)	(\$2,698,416.42)	
Operating Expense		(\$1,198,205.00)	(\$1,681,532.00)	(\$99,007.67)	(\$103,411.30)	(\$157,281.61)	(\$53,899.34)	(\$100,044.40)	(\$81,878.53)	(\$55,782.83)	(\$134,724.06)	(\$133,443.09)	(\$117,428.03)	(\$1,036,900.86)	
Total Expense		(\$4,532,321.00)	(\$5,021,648.00)	(\$243,992.61)	(\$365,435.26)	(\$531,877.03)	(\$314,401.43)	(\$349,982.91)	(\$343,659.90)	(\$317,853.02)	(\$396,473.76)	(\$498,075.05)	(\$373,566.31)	(\$3,735,317.28)	
Total Revenue		\$1,107,501.00	\$1,186,357.00	\$1,941.84	\$2,834.48	\$42,125.48	\$35,509.27	\$577,600.62	\$1,380.00	\$12,654.52	\$8,947.56	\$490,089.30	\$10,236.82	\$1,183,319.89	

Compliance & Authentication

2021/22 Compliance Documents - 2021/22 Compliance Documents

Application Status: Completed / Ready to Submit

Appleton Public Library

Agency Overview

General Information

Agency Name	Appleton Public Library
Website	https://www.apl.org/
Primary Address	225 N Oneida St, Appleton, WI, 54911, US
Telephone Number	(920) 832-6170
Executive Director	
Board President Name	Nancy Scheuerman
Date Board President's Term Expires	8/15/2023

Mission Statement

Agency Mission Statement

The Appleton Public Library's mission/vision statement is "Learn, know, gather, grow – your center of community life. Where potential is transformed into reality." This mission statement embraces the role of APL beyond serving as a warehouse for books, looking deeply into our relationship with our community and how best we can serve them with programs, events, collections and as a hub for learning and literacy.

2023 Proposed Close Dates

January 1, 2023	Closed	New Year's Day (Sunday)
February TBD	Closed	TBD Staff Training
April 9, 2023	Closed	Easter (Sunday)
May 27, 2023	Summer Hours Begin	Open 9-1 (Saturday)
May 28, 2023	Closed	Sunday
May 29, 2023	Closed	Memorial Day (Monday)
June 4, 11, 18, 25	Closed	Sundays
July 4 2023	Closed	Independence Day (Tuesday)
July 2, 9, 16, 23, 30	Closed	Sundays
August 6, 13, 20, 27	Closed	Sundays
September 3, 2023	Closed	Sunday
September 4, 2023	Closed	Labor Day (Monday)
September 5, 2023	School Year hours begin	Tuesday
November 23, 2023	Closed	Thanksgiving Day (Thursday)
December 24, 2023	Closed	Christmas Eve (Sunday)
December 25, 2023	Closed	Christmas Day (Monday)
December 31, 2023	Closed	New Year's Eve (Sunday)
January 1, 2023	Closed	New Year's Day (Monday)



Meeting Minutes
Library Board

Tuesday, November 8, 2022

10:30 AM

City Hall - 100 N. Appleton Street 6th Floor 6 A/B

Library Board Personnel & Policy Committee

1. Call meeting to order

Chairperson Margret Mann called the meeting to order at 10:30am

2. Roll call of membership

Director Ratchman arrived at 11:11am

Others Present: Jay Ratchman, Colleen Rortvedt, Tasha Saecker, Mayor Woodford

Present: 3 - Kellner, Mann and Brozek

Others : 1 - Scheuerman

3. **Action Items**

Closed Session

Mayor Woodford left the meeting at 11:10am

Kellner moved, seconded by Brozek that the Committee meet in Closed Session pursuant to WI statute 19.85(f)(c) to discuss personnel matters. Voice Vote. Motion Carried. (3-0)

Roll Call was taken. The Committee went into Closed Session at 10:31am

Kellner moved, seconded by Brozek the Committee reconvene in Open Session. Voice Vote. Motion Carried. (3-0) Roll Call was taken. The Committee resumed meeting in Open Session at 11:10am

[22-1428](#)

Library Director's End of Year 2022 Performance Review

Brozek moved, seconded by Kellner, that the Library Director's 2022 End of Year Performance Review be recommended for approval. Voice Vote. Motion Carried. (3-0)

[22-1429](#)

City of Appleton Non-Represented (Non-Union) Employee Compensation Study

Attachments: [Baker Tilly Memo Summary.pdf](#)
[HR Comp Memo.pdf](#)
[Salary Admin Policy \(1\).pdf](#)
[Seasonal Policy.pdf](#)

Jay Ratchman left the meeting at 11:30am

Kellner moved, seconded by Brozek, that the City of Appleton Non-Represented (Non-Union) Compensation Study be recommended for approval. Voice Vote. Motion Carried. (3-0)

[22-1433](#)

Updates to Naming Rights Policy and Name Change to Naming Opportunities Policy

Attachments: [Naming Opportunities Policy 11-2022 AMENDED \(Draft\).pdf](#)

Kellner moved, seconded by Brozek, that the Naming Rights and Name Change Policy be amended by replacing all occurrences of the term “naming rights” to “naming opportunities” as well as spelling out the capital campaign to include the full name of "Building Beyond Words" for each mention of it be recommended for approval. Voice Vote. Motion Carried. (3-0)

[22-1434](#)

Financial Policy

Attachments: [Financial Policy \(Draft 11-2022\).pdf](#)

Mann moved, seconded by Brozek, that the Financial Policy be recommended for approval. Voice Vote. Motion Carried. (3-0)

4. Adjournment

Kellner moved, seconded by Brozek that the meeting be Adjourned. Voice Vote. Motion Carried. (3-0)
The meeting was Adjourned at 11:41am



Baker Tilly US, LLP
2500 Dallas Pkwy, Suite 300
Plano, TX 75093

T: +1 (972) 748 0514
bakertilly.com

October 10, 2022

Mr. Jay Ratchman
City of Appleton
Human Resources Department
100 North Appleton Street
6th Floor
Appleton, WI 54911-4799

Dear Mr. Ratchman:

Baker Tilly US, LLP ("Baker Tilly") is pleased to provide the City of Appleton, Wisconsin ("Appleton" or "the City") with results from the completed Classification and Compensation Study. This report documents the approach, findings, and recommendations resulting from the study.

We would like to thank you, Kim Kamp, as well as other City staff that aided us in bringing this study to its successful completion. We understand that your employees are your greatest asset and without a competitive pay program the City of Appleton may struggle to attract qualified candidates and retain/reward experienced employees. We have created a classification and compensation system that, if implemented, will ensure that the City's positions are externally competitive and internally equitable.

It has been a pleasure working with the City of Appleton and we hope to provide you with professional assistance in the future. Further, we would be happy to answer any questions or points of clarity to the findings and recommendations of this study.

Sincerely,

Jada Kent

Jada Kent, CCP
Senior Manager

Brenda Turner

Brenda Turner, CCP
Manager

Project Methodology

Baker Tilly approached the classification and compensation study for the City of Appleton by completing each of the following phases or milestones:

- **Data Collection** - Baker Tilly initiated the study by conducting a planning meeting with the City's project team to discuss the current classification and compensation system, goals for conducting the study, and to walk through each phase of the process. Next, Baker Tilly collected documentation from the City, to include job descriptions, organization charts, pay structure, personnel policies, and any other documentation describing how work is performed or compensated.

Finally, Baker Tilly facilitated communication meetings with department heads and employees to inform them about the study, answer questions, and review the position analysis questionnaire (PAQ) they were asked to complete. Once PAQ responses were compiled, the City's leadership was tasked with reviewing and providing feedback on employee PAQ responses, as necessary, to ensure accurate and complete responses were provided.

- **Position review** – Employee completed PAQs were the basis for a classification review in which Baker Tilly reviewed position titles and made recommendations, as necessary, to ensure titles appropriately reflected the nature and level of work performed. Next, Baker Tilly conducted job evaluation using our point factor evaluation tool, called SAFE, resulting in a hierarchy of jobs reflective of City's internal equity. FLSA designations were also reviewed.
- **Market Assessment** - Baker Tilly assisted the City in identifying appropriate and relevant peer organizations to collect market competitive values (base pay salaries) for benchmark positions from. The results were analyzed and reviewed with the City's project team to determine the organizations desired position within the market. Fringe benefits information was also collected and compared to the City's offerings.
- **Pay Plan Development** – Baker Tilly established a new pay plan and seasonal pay plan for the City and established grade assignments with consideration to internal and external equity. The City's project team further reviewed and adjusted some grade assignments to reflect internal equity.
- **Project Completion** - At the conclusion of the study, Baker Tilly prepared this final report documenting the methodology used throughout the classification and compensation study, findings and results of the study, as well as our recommendations based on those results. Going forward, Baker Tilly will provide training to Appleton's human resources team responsible for the maintenance and administration of the new classification and compensation system. This includes instructions for utilizing our SAFE Job Evaluation system going forward.

Position Review

Job Evaluation

Job evaluation is the process of comparing a job against other jobs within the organization as a means for determining the relative value of each job. In other words, job evaluation is a tool for identifying the internal value within the organization.

The Systematic Analysis and Factor Evaluation (SAFE®) is a point factor evaluation process comprised of nine (9) compensable factors and was developed specifically for the measurement of local government positions. Job evaluation is often the preferred method for reviewing jobs internally because, as an approach, it tends to be systematic, objective, and – therefore - defensible. For that reason, job evaluation is often a tool used to comply with federal, state, local regulations related to the Equal Pay Act.

All positions were evaluated against the following compensable factors:

Education	Human interaction	Independence of actions
Experience	Working conditions	Impact on the organization
Level of work	Physical demands	Supervision exercised

In using a point factor job evaluation system, the result is a total score for each position which represents the internal value of that position. Collectively, these total scores establish a hierarchy across the organization. It's important to emphasize that job evaluation is a measurement of the position and not the person in the position. Baker Tilly established preliminary job evaluation designations based on employee completed PAQs. The City's project team reviewed and revised SAFE designations, as necessary, and worked with Baker Tilly to establish final scores for each position included in the study.

The following factors were not considered when evaluating positions with the SAFE methodology: employee performance, length of service with the organization, amount of time in the position, education or experience more than what is required by the position, current salary, or market rates.

FLSA Review

Baker Tilly conducted a review of the Fair Labor Standard Act (FLSA) designation to assist the City with the application of exempt and nonexempt status. The review was based on the City's existing documentation (job descriptions, organization charts, pay plans), as well as new documentation (employee completed position analysis questionnaire (PAQs) to ensure a holistic understanding of the nature and level of work performed by each position. Finalized FLSA assignments are attached.

Market Assessment

Public Peer Organizations

Understanding your labor market is key to selecting relevant peer organizations for a market study. Factors to consider include industry, organization size, geographic location, competition for talent, and published data available.

Baker Tilly worked with Appleton to identify public peer organizations to be included in the study and base pay information was collected from 24 organizations, listed below.

- | | | |
|------------------------|---|------------------------|
| 1. Brown County | 10. Village of Kimberly | 18. City of Waukesha |
| 2. Calumet County | 11. City of Manitowoc | 19. City of Janesville |
| 3. City of De Pere | 12. City of Menasha | 20. City of Racine |
| 4. City of Eau Claire | 13. City of Neenah | 21. City of Wausau |
| 5. City of Fond du Lac | 14. City of Oshkosh | 22. Winnebago County |
| 6. Town of Grand Chute | 15. Outagamie County | 23. City of Sheboygan |
| 7. City of Green Bay | 16. City of Two Rivers | 24. City of La Crosse |
| 8. City of Kaukauna | 17. Madison Metropolitan
Sewage District | |
| 9. City of Kenosha | | |

* Additional resources referenced for specialized positions in Transit and Utilities departments.

Data Adjustments

The market data obtained was adjusted, as necessary, to account for the following:

- Differences in work week. For example, reported salaries for a 37.5-hour work week was adjusted to reflect that wage for a 40-hour work week.
- If the market data obtained did not reflect the year in which this study was conducted, the data was aged using World at Work's Annual Salary Budget Survey results.
- Geographic adjustments were applied to account for cost-of-labor differences between the City of Appleton and peer organizations. Baker Tilly uses cost-of-labor differentials reported by the ERI's Geographic Assessor tool. Where cost of living is a measurement of goods and services in each area, the cost of labor is a measurement of compensation paid. Cost of labor can be impacted by the cost of living, but also relates to the supply and demand of labor in each area (rate of unemployment and number of qualified laborers).
 - Geographic differentials applied for each peer and published source can be found in the table below. The geographic cost of labor in Appleton is 96.7 and data from each locality was adjusted by the number in the far-right column. For example, the geographic cost of labor in Fond du Lac, WI is 1.2% higher than in Appleton and their data was adjusted down 1.2% to neutralize those geographical differences.

Date Pulled	Client Name	Location	Geo Adjust	Client Avg Base
Q2/Q2022	Appleton, WI	Appleton, WI	96.7	69,243

Peer #	Peer Organization	Locality Used	ERI Indicatd	GeoDiff %
1	Brown County, WI	Green Bay, WI	95.6	1.1%
2	Calumet County, WI	Brillion, WI	95.4	1.3%
3	DePere, WI	De Pere, WI	94.5	2.2%
4	Eau Claire, WI	Eau Claire, WI	92.6	4.1%
5	Fond du Lac, WI	Fond du Lac, WI	97.9	-1.2%
6	Grand Chute, WI	Grand Chute, WI	96.7	0.0%
7	Green Bay, WI	Green Bay, WI	95.6	1.1%
8	Kaukauna, WI	Kaukauna, WI	95.7	1.0%
9	Kenosha, WI	Kenosha, WI	106.1	-9.4%
10	Kimberly, WI	Grand Chute, WI	96.7	0.0%
11	Manitowoc, WI	Manitowoc, WI	93.1	3.6%
12	Menasha, WI	Menasha, WI	95.8	0.9%
13	Neenah, WI	Neenah, WI	96.0	0.7%
14	Oshkosh, WI	Oshkosh, WI	96.7	0.0%
15	Outagamie County, WI	Appleton, WI	96.7	0.0%
16	Two Rivers, WI	Two Rivers, WI	92.7	4.0%
17	Madison Metropolitan Sewage District	Madison, WI	97.9	-1.2%
18	Waukesha, WI	Waukesha, WI	102.2	-5.5%
19	Janesville, WI	Janesville, WI	96.1	0.6%
20	Racine, WI	Racine, WI	100.1	-3.4%
21	Wausau, WI	Wausau, WI	95.2	1.5%
22	Winnebago County, WI	Oshkosh, WI	96.7	0.0%
23	Sheboygan, WI	Sheboygan	97.8	-1.1%
24	La Crosse, WI	La Crosse, WI	93.3	3.4%

Quality Control

Baker Tilly prepared a summary of each benchmark position which included minimum education and experience requirements. Peer organizations were asked to match the position within their organization with at least a 75% overlap in duties and responsibilities. Baker Tilly reviewed peer responses and removed or replaced data that appeared to be an inappropriate match. Some organizations returned base pay information for Baker Tilly to match on their behalf.

Because market results are established by a calculation (such as an average of all midpoints), a bigger sample size tends to yield greater confidence in those results. Therefore, Baker Tilly required at least four matches per benchmark position to determine a market value.

Market Results

Of Appleton's 173 positions, 91 were included in the survey as benchmark positions (52.6%). Baker Tilly requested pay ranges (minimum to maximum) and calculated for the midpoint of each collected range. Of the 91 benchmark positions, 5 received insufficient data and a market value was not calculated. Overall, market values were established for 94.5% of Appleton's benchmark positions.

Average minimum, midpoint, and maximum data results can be found in the charts below. The market average midpoint is commonly observed to reflect "the market" value for a given position.

Pay Plan Development

Upon reviewing the market survey results with the City’s project team, Baker Tilly led a discussion with the organization regarding desired position within market, pay plan design preferences, and an approach for classifying positions to the pay plan.

Proposed Pay Plan

The proposed pay plans, shown below, are open plans (Grades, no steps) with the midpoint set at the market midpoint for each grade. There are 15 grades with range spreads from 40% to 50% and midpoint differentials from 2.5% to 10%.

General Pay Plan

Grade	Minimum	Midpoint	Maximum	Range Spread
1	\$29,583	\$35,500	\$41,416	40%
2	\$32,542	\$39,050	\$45,559	40%
3	\$35,796	\$42,955	\$50,114	40%
4	\$39,376	\$47,251	\$55,126	40%
5	\$43,313	\$51,976	\$60,638	40%
6	\$47,645	\$57,174	\$66,703	40%
7	\$52,409	\$62,891	\$73,373	40%
8	\$57,650	\$69,180	\$80,710	40%
9	\$60,878	\$76,098	\$91,317	50%
10	\$66,966	\$83,708	\$100,449	50%
11	\$68,641	\$85,801	\$102,962	50%
12	\$73,658	\$92,073	\$110,487	50%
13	\$81,024	\$101,280	\$121,536	50%
14	\$89,126	\$111,408	\$133,689	50%
15	\$98,039	\$122,549	\$147,059	50%

LTE/Seasonal/Substitute Pay Scale

Grade	Title	Minimum	Midpoint	Maximum
Grade 1	Scorekeepers	\$ 11.00	\$ 12.00	\$ 13.00
	Attendant/Grounds Personnel	\$ 11.00	\$ 12.00	\$ 13.00
	Library Page	\$ 11.00	\$ 12.00	\$ 13.00
Grade 2	Customer Service Associate/Cashier	\$ 13.01	\$ 14.01	\$ 15.00
	Program Activity Leader I	\$ 13.01	\$ 14.01	\$ 15.00
	Sports Official I	\$ 13.01	\$ 14.01	\$ 15.00
Grade 3	Facility Manager I	\$ 15.01	\$ 16.01	\$ 17.00
	Laborer	\$ 15.01	\$ 16.01	\$ 17.00
	Lifeguard I	\$ 15.01	\$ 16.01	\$ 17.00
	Program Activity Leader II	\$ 15.01	\$ 16.01	\$ 17.00
	Recreational Instructor I	\$ 15.01	\$ 16.01	\$ 17.00
	Student/Intern	\$ 15.01	\$ 16.01	\$ 17.00
Grade 4	Activity Coordinator I	\$ 17.01	\$ 18.01	\$ 19.00
	Facility Manager II	\$ 17.01	\$ 18.01	\$ 19.00
	Community Service Officer (CSO)	\$ 17.01	\$ 18.01	\$ 19.00
	Engineering Aide	\$ 17.01	\$ 18.01	\$ 19.00
	Instructor II	\$ 17.01	\$ 18.01	\$ 19.00
	Lifeguard II	\$ 17.01	\$ 18.01	\$ 19.00
	Sports Official II	\$ 17.01	\$ 18.01	\$ 19.00
Grade 5	Activity Coordinator II	\$ 19.01	\$ 20.51	\$ 22.00
	Seasonal Managers	\$ 19.01	\$ 20.51	\$ 22.00
	Sports Official III	\$ 19.01	\$ 20.51	\$ 22.00

Title	Rate	Frequency
Certified Sports Officials	\$30	Per game
Certified Fitness Instructors	\$30	Per class
Background Investigator	\$30	Per hour
Chief Elections Inspector and Co-chief	\$13	Per hour
Elections Inspector	\$10	Per hour

Compensation Philosophy / Pay Policy Review

A compensation philosophy is a statement of commitment by an organization to its employees, regarding how and why the compensation program exists, the goals for the program, and how it will be managed. Most typically it includes a commitment to pay equity along with the following components: definition of market, intending position within the market, total rewards provided by the organization, as well as administrative guidelines for achieving the compensation philosophy goal.

Baker Tilly met with the City's project team to discuss current pay policies and any challenges the City was facing with regards to the language and application of those policies. Next, Baker Tilly worked with the City to establish a compensation philosophy that describes the intention and expectation for administering the new classification and compensation system in a way that will help the City attract and retain qualified workers to continue providing high quality services to the community. As a result, the salary administration policy and seasonal pay policy are attached with highlighted changes that are recommended.

Recommendations

The City of Appleton is a service-oriented organization. The organization delivers services through its employees who are a major investment in the organization's infrastructure.

This report contains information which has been gathered from a variety of sources, objectively analyzed, and structured in a way that will provide a fair, defensible, and competitive system for the City to compensate its employees. It is our independent judgment that has resulted in the following recommendations.

We urge the City of Appleton to:

- Approve the recommended position title and classification adjustments.
- Approve the proposed pay plan and position grade assignments.
- Adopt recommended changes and/or additions to the City's pay policies to ensure the new classification and compensation system is administered in a way that achieves the City's compensation philosophy.
- Continue efforts to maintain the classification and compensation system by routinely reviewing positions, descriptions, and market rates. This includes adjustments to the pay structure annual to keep pace with the market as well as adoption of merit increases to reward employees and keep them moving through their pay ranges.

Title and Grade Assignments
 Appleton, WI

Department	Title	FLSA	Grade	Minimum	Midpoint	Maximum	Hourly		
							Minimum	Midpoint	Maximum
PUBLIC WORKS	Parking Ramp Attendant	N	1	\$29,583	\$35,500	\$41,416	\$14.22	\$17.07	\$19.91
LIBRARY	Bindery Clerk	N	2	\$32,542	\$39,050	\$45,559	\$15.65	\$18.77	\$21.90
LIBRARY	Library Page Clerk	N	2	\$32,542	\$39,050	\$45,559	\$15.65	\$18.77	\$21.90
FINANCE	Account Clerk I - Finance	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
LIBRARY	Library Clerk	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
LIBRARY	Operation Clerk - Library	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
PUBLIC WORKS	Operator	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
PUBLIC WORKS	Parking Enforcement Person	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
PUBLIC WORKS	Parking Enforcement/Ramp Atnd	N	3	\$35,796	\$42,955	\$50,114	\$17.21	\$20.65	\$24.09
FINANCE	Account Clerk II	N	4	\$39,376	\$47,251	\$55,126	\$18.93	\$22.72	\$26.50
Multiple Departments	Administrative Assistant	N	4	\$39,376	\$47,251	\$55,126	\$18.93	\$22.72	\$26.50
PUBLIC WORKS	Operator I- Parking	N	4	\$39,376	\$47,251	\$55,126	\$18.93	\$22.72	\$26.50
PUBLIC WORKS	Service Person-CEA & Parking	N	4	\$39,376	\$47,251	\$55,126	\$18.93	\$22.72	\$26.50
PUBLIC WORKS	Utility Locator	N	4	\$39,376	\$47,251	\$55,126	\$18.93	\$22.72	\$26.50
FINANCE	Account Clerk III - Finance	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
Library	Administrative Support Specialist - Financial	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
Multiple Departments	Administrative Supt Specialist	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
POLICE	Communication Specialist - PD	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
POLICE	Crime Analyst - Police	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
PUBLIC WORKS	Customer Service Specialist	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
PARKS/REC/FACILITIES MGMT	Grounds Coordinator	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
PUBLIC WORKS	Operations Crew Leader-Parking	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
PUBLIC WORKS	Operator I	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
COMMUNITY/ECONOMIC DEV	Real Estate Assessment Tech	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
FINANCE	Utility Clerk - Finance	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
HEALTH	Weights & Measures Spec	N	5	\$43,313	\$51,976	\$60,638	\$20.82	\$24.99	\$29.15
PUBLIC WORKS	Arborist	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
PUBLIC WORKS	Assessment Technician-Lead	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
COMMUNITY/ECONOMIC DEV	Coordinated Entry Specialist	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
LEGAL SERVICES	Deputy City Clerk	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
PUBLIC WORKS	Erosion Control Inspector	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
PARKS/REC/FACILITIES MGMT	Facilities Technician	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
POLICE	Forensic Evidence Specialist	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
PARKS/REC/FACILITIES MGMT	Grounds Technician	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
INFORMATION TECHNOLOGY	Help Desk Analyst	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
UTILITIES	Laboratory Technician	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
LIBRARY	Library Assistant	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
LIBRARY	Network Services Assistant	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
PUBLIC WORKS	Operator II	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
FINANCE	Payroll Coordinator	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
COMMUNITY/ECONOMIC DEV	Personal Prop Assessment Tech	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
FINANCE	Property Tax Specialist	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
UTILITIES	Relief Operator-Wastewater	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
UTILITIES	Solids Operator	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
VALLEY TRANSIT	Travel Training Specialist	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
UTILITIES	Wastewater Plant Operator	N	6	\$47,645	\$57,174	\$66,703	\$22.91	\$27.49	\$32.07
UTILITIES	Asset Mgmt Purchasing Specdist	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
HUMAN RESOURCES	Benefits Coordinator	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28

Title and Grade Assignments
Appleton, WI

Department	Title	FLSA	Grade	Minimum	Midpoint	Maximum	Hourly Minimum	Hourly Midpoint	Hourly Maximum
PARKS/REC/FACILITIES MGMT	Carpenter/Painter	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
FIRE	Civilian Fire Inspector	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
COMMUNITY/ECONOMIC DEV	Community Development Specialist	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PUBLIC WORKS	Engineering Technician	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
HEALTH	Environmentalist II	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
MAYORS OFFICE	Executive Assistant - Mayor	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
POLICE	Executive Assistant - Police Chief	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PARKS/REC/FACILITIES MGMT	Facilities Control Technician	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
FIRE	Fire Public Education and Civilian Fire Inspector	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PUBLIC WORKS	Horticulturist-Conserv Tech	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PARKS/REC/FACILITIES MGMT	HVAC Tech/Pipefitter	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
POLICE	Lead CSO	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
LEGAL SERVICES	Legal Assistant	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
LIBRARY	Library Assistant Supervisor	E	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PUBLIC WORKS	Master Mechanic	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
INFORMATION TECHNOLOGY	PC/LAN Specialist	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
COMMUNITY/ECONOMIC DEV	Property Assessor II	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PUBLIC WORKS	Purchasing Clerk	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PARKS/REC/FACILITIES MGMT	Recreation Coordinator	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
UTILITIES	Relief Operator/Maintenance Helper-Water	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
LIBRARY	Safety Supervisor	E	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PUBLIC WORKS	Traffic Engineering Specialist	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
FIRE	Trng & Resource Dev Specialist	E	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
UTILITIES	Water Plant Operator	N	7	\$52,409	\$62,891	\$73,373	\$25.20	\$30.24	\$35.28
PARKS/REC/FACILITIES MGMT	Admin Services Coord-PRFM	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
VALLEY TRANSIT	Administrative Serv Manager-VT	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Assistant Facilities Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
FIRE	Assistant To Fire Chief	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
FINANCE	Budget and Accounting Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	City Surveyor	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Clubhouse Supervisor	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	DPW Plans & Records Specialist	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
COMMUNITY/ECONOMIC DEV	Economic Development Specialist	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Facilities Tech Electrician	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
POLICE	Fiscal Resources Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
COMMUNITY/ECONOMIC DEV	GIS Specialist	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
COMMUNITY/ECONOMIC DEV	Housing Coordinator	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
UTILITIES	Instrmnt/Control Systems Tech	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Lead Electrician	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Lead Mechanic	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
LIBRARY	Librarian	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
UTILITIES	Maint Specialist Millwright	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Managerial Account Coordinator	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
LIBRARY	Marketing Coordinator-Library	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Marketing/Community Engagement Coordinator .5FTE	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
Multiple Departments	Master Electrician	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
VALLEY TRANSIT	Mobility Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
LIBRARY	Network Services Supervisor	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Office Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Operations Crew Leader - MSB	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PUBLIC WORKS	Parking Utility Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Plumber	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
COMMUNITY/ECONOMIC DEV	Property Assessor III	N	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80

Title and Grade Assignments
Appleton, WI

Department	Title	FLSA	Grade	Minimum	Midpoint	Maximum	Hourly		
							Minimum	Midpoint	Maximum
HEALTH	Public Health Nurse	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
FINANCE	Purchasing Manager	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
PARKS/REC/FACILITIES MGMT	Recreation Programmer	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
INFORMATION TECHNOLOGY	Systems Analyst	E	8	\$57,650	\$69,180	\$80,710	\$27.72	\$33.26	\$38.80
POLICE	Administrative Serv Supervisor	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
LEGAL SERVICES	Assistant City Attorney I	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
HEALTH	City Sealer	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
PUBLIC WORKS	Civil Engineer	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
FINANCE	Customer Serv Accounting Spvr	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
MAYORS OFFICE	Diversity, Equity and Inclusion Coordinator & Special Assistant to the Mayor	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
FINANCE	Enterprise Accounting Manager	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
UTILITIES	Environmental Program Coordinator	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
HUMAN RESOURCES	Human Resources Generalist	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
PUBLIC WORKS	Inspector	N	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
INFORMATION TECHNOLOGY	Lead Systems Analyst	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
LIBRARY	Library Building Supervisor	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
VALLEY TRANSIT	Paratransit Coord/Oper Supvr	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
COMMUNITY/ECONOMIC DEV	Principal Planner	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
MAYORS OFFICE	Senior Communications Specialist	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
UTILITIES	Technical Services Manager	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
VALLEY TRANSIT	Transit Maint Operations Supvr	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
VALLEY TRANSIT	Transit Operations Specialist	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
VALLEY TRANSIT	Transit Operations Supervisor	E	9	\$60,878	\$76,098	\$91,317	\$29.27	\$36.59	\$43.90
HEALTH	Environmental Health Supervisor	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Inspections Supervisor	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
LIBRARY	Library Supervisor	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Oper Supervisor-Engineering	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor - Fleet	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor - Safety	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor - Sanitation	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor - Street	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor - Water Construction	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PUBLIC WORKS	Operations Supervisor Forestry	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
PARKS/REC/FACILITIES MGMT	Recreation Manager	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
INFORMATION TECHNOLOGY	Software Engineer	E	10	\$66,966	\$83,708	\$100,449	\$32.20	\$40.24	\$48.29
LEGAL SERVICES	City Clerk	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
HEALTH	Emergency Mgmt Coordinator	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
INFORMATION TECHNOLOGY	Network Administrator	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
POLICE	Police Lieutenant	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
PUBLIC WORKS	Professional Engineer	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
HUMAN RESOURCES	Risk Manager	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
HUMAN RESOURCES	Staff Dev/Training Coordinator	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
UTILITIES	Water Operations Supervisor	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
UTILITIES	WWW Operations Supervisor	E	11	\$68,641	\$85,801	\$102,962	\$33.00	\$41.25	\$49.50
LEGAL SERVICES	Assistant City Attorney II	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
PUBLIC WORKS	Assistant City Engineer	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
COMMUNITY/ECONOMIC DEV	City Assessor	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
PARKS/REC/FACILITIES MGMT	Facilities Manager	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
PARKS/REC/FACILITIES MGMT	Facility Project Manager & Sustainability Coordinator	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
FIRE	Fire Battalion Chief	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12

Title and Grade Assignments
Appleton, WI

Department	Title	FLSA	Grade	Minimum	Midpoint	Maximum	Hourly Minimum	Hourly Midpoint	Hourly Maximum
PARKS/REC/FACILITIES MGMT	Golf Course Superintendent	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
PARKS/REC/FACILITIES MGMT	Grounds Manager	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
POLICE	Police Captain	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
PUBLIC WORKS	Traffic Engineer	E	12	\$73,658	\$92,073	\$110,487	\$35.41	\$44.27	\$53.12
POLICE	Assistant Chief - Police	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
VALLEY TRANSIT	Assistant General Manager	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
LIBRARY	Assistant Library Director	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
LEGAL SERVICES	Deputy City Attorney	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
COMMUNITY/ECONOMIC DEV	Deputy Dir Community Econ Dev	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
HUMAN RESOURCES	Deputy Dir Human Resources	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
PARKS/REC/FACILITIES MGMT	Deputy Dir Park/Rec/Facilities	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
FINANCE	Deputy Director Finance	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
HEALTH	Deputy Director Health	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
PUBLIC WORKS	Deputy Director Operations	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
UTILITIES	Deputy Director Utilities	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
FIRE	Deputy Fire Chief	E	13	\$81,024	\$101,280	\$121,536	\$38.95	\$48.69	\$58.43
PUBLIC WORKS	Deputy Director/City Engineer	E	14	\$89,126	\$111,408	\$133,689	\$42.85	\$53.56	\$64.27
LEGAL SERVICES	City Attorney	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
COMMUNITY/ECONOMIC DEV	Community & Economic Dev Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
FINANCE	Finance Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
FIRE	Fire Chief	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
VALLEY TRANSIT	General Manager	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
HEALTH	Health Officer	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
HUMAN RESOURCES	Human Resources Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
INFORMATION TECHNOLOGY	Information Technology Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
LIBRARY	Library Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
PARKS/REC/FACILITIES MGMT	Park/Rec/Facilities Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
POLICE	Police Chief	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
PUBLIC WORKS	Public Works Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70
UTILITIES	Utilities Director	E	15	\$98,039	\$122,549	\$147,059	\$47.13	\$58.92	\$70.70

**LTE/Seasonal/Substitute Positions Pay Scale
Appleton, WI**

Grade	Title	Minimum	Midpoint	Maximum
Grade 1	Scorekeepers	\$ 11.00	\$ 12.00	\$ 13.00
	Attendant/Grounds Personnel	\$ 11.00	\$ 12.00	\$ 13.00
	Library Page	\$ 11.00	\$ 12.00	\$ 13.00
Grade 2	Customer Service Associate/Cashier	\$ 13.01	\$ 14.01	\$ 15.00
	Program Activity Leader I	\$ 13.01	\$ 14.01	\$ 15.00
	Sports Official I	\$ 13.01	\$ 14.01	\$ 15.00
Grade 3	Facility Manager I	\$ 15.01	\$ 16.01	\$ 17.00
	Laborer	\$ 15.01	\$ 16.01	\$ 17.00
	Lifeguard I	\$ 15.01	\$ 16.01	\$ 17.00
	Program Activity Leader II	\$ 15.01	\$ 16.01	\$ 17.00
	Recreational Instructor I	\$ 15.01	\$ 16.01	\$ 17.00
	Student/Intern	\$ 15.01	\$ 16.01	\$ 17.00
Grade 4	Activity Coordinator I	\$ 17.01	\$ 18.01	\$ 19.00
	Facility Manager II	\$ 17.01	\$ 18.01	\$ 19.00
	Community Service Officer (CSO)	\$ 17.01	\$ 18.01	\$ 19.00
	Engineering Aide	\$ 17.01	\$ 18.01	\$ 19.00
	Instructor II	\$ 17.01	\$ 18.01	\$ 19.00
	Lifeguard II	\$ 17.01	\$ 18.01	\$ 19.00
	Sports Official II	\$ 17.01	\$ 18.01	\$ 19.00
Grade 5	Activity Coordinator II	\$ 19.01	\$ 20.51	\$ 22.00
	Seasonal Managers	\$ 19.01	\$ 20.51	\$ 22.00
	Sports Official III	\$ 19.01	\$ 20.51	\$ 22.00

Specialty Assignments

Title	Rate	Frequency
Certified Sports Officials	\$30	Per game
Certified Fitness Instructors	\$30	Per class
Background Investigator	\$30	Per hour
Chief Elections Inspector and Co-chief	\$13	Per hour
Elections Inspector	\$10	Per hour

CITY OF APPLETON

HUMAN RESOURCES DEPARTMENT



100 N. Appleton St.
Appleton, WI 54911



(920) 832-6458



(920) 832-5845



humanresources@appleton.org

To: Human Resources/Information Technology Committee and Appleton Common Council

From: Human Resources Director Jay Ratchman

Date: October 19, 2022

Re: Non-represented (Non-Union) Employee Compensation Study

In 2021, the Mayor and the Director Leadership team initiated the process of examining the City of Appleton (COA) compensation program and engaging in a full review. The last full compensation review was completed in 2011-2012 by Carlson and Dettmann Consulting, LLC.

After a competitive request for proposal process, and after approval by the Appleton Common Council, the City hired Baker Tilly to complete a compensation study for non-represented positions. It was their combination of qualifications, proven background in creating and defending compensation plans, and their competitive costs that made them our best partner. The compensation study officially kicked off in February 2022.

Baker Tilly evaluated City positions using their copyrighted job evaluation system known as the Systematic Analysis and Factor Evaluation (SAFE), providing a defensible foundation against legal claims. In addition, Baker Tilly completed a market assessment, comparing City positions to comparable public employers and cross-referencing private sector market data resources.

The intent of the compensation study was to make sure that positions in the organization remained market competitive and that pay practices were fair, equitable, and in compliance with state and federal laws.

The results of Baker Tilly's findings were reported out and reviewed by the COA Compensation Study Review committee, which is comprised of representatives from various departments. This committee also reviewed current COA pay policies.

Attached please find a packet that includes a summary of findings from Baker Tilly. This includes new pay plans for non-represented employees and for seasonal/LTE/substitute employees. Both pay plans provide an open range system, with wages ranging from a minimum to a maximum. It is the recommendation from Baker Tilly that all employees be placed within the range of their respective position and paygrade.

In addition, please find updates to the Salary Administration policy and the Seasonal policy. The most notable change is moving to a merit-based performance increase system. This merit-based system provides an across-the-board increase, approved through the City's budgeting process, for employees who meet or exceed the expectations of their position.

Our recommendation is to implement the new pay plans and policy updates effective January 1, 2023. If you have any questions, please feel free to contact me at (920) 832-6427.

CITY OF APPLETON PERSONNEL POLICIES	TITLE: SALARY ADMINISTRATION	
ISSUE DATE:	LAST UPDATE: October 2022	SECTION: Human Resources
POLICY SOURCE: Human Resources Department	AUDIENCE: All regular full and part-time employees covered by the Non-represented compensation plan. Excludes represented employees.	TOTAL PAGES: 7
Reviewed by Legal Services Date:	Committee Approval Date:	Council Approval Date:

I. PURPOSE

To outline the guidelines utilized for administration of the compensation plan.

II. POLICY

It is the policy of the City of Appleton to provide competitive compensation to attract and retain competent staff and to encourage and reward performance within the financial resources available.

III. DISCUSSION

The City of Appleton is committed to rewarding team members in a fair and consistent manner, we offer compensation and rewards that support equity and align with our diversity, equity, and inclusion values. We aim to attract and retain employees to contribute to the success of the organization. This policy is subject to change with approval of the Common Council. The Human Resources Director shall be responsible for the administration of the compensation policy.

DEFINITIONS

- A. Fair Labor Standards Act (FLSA): A federal act that sets minimum wage, overtime pay, equal pay, record keeping and child labor standards for employees who are covered by the act and who are not exempt from specific provisions. An employee classified in the compensation plan as “Exempt” is not eligible for the overtime compensation provisions of FLSA.
- B. Base Pay: An employee's initial rate of compensation, excluding extra lump sum compensation, shift differential etc. An employee's base pay can be expressed as a base hourly rate of pay or as an annual salary.
- C. Position Analysis Questionnaire (PAQ): A job analysis that outlines the responsibilities and the requirements necessary to perform the functions of the position. The PAQ is utilized to evaluate the position responsibilities for allocation to the appropriate pay grade.
- D. Compensation Plan: A schedule of pay ranges listing the job classifications and minimum/maximum rates. All regular positions shall be placed in one of these ranges based on a PAQ and point factor job evaluation.
- E. Emergency: For purposes of this policy, an emergency shall be defined as an unplanned, significant event that affects the operation, or service level of the department (as determined by the Department

Director and/or the Mayor)

- F. Interim Assignment: When an employee is assigned to a different position on a temporary basis, because of a vacancy.
- G. Non-base pay adjustment: Pay adjustments generally in the form of a lump sum or other forms that do not increase the employee's base pay.
- H. Red-circled: The maintenance of an employee's pay rate above the established range maximum. An employee whose pay rate is at or above the range maximum may be eligible for a non-base performance adjustment.
- I. Midpoint: The center of an open pay range. The midpoint provides a reference point to measure progression within the pay range.

IV. PROCEDURES

A. DETERMINATION OF PAY RANGES

The compensation plan shall be based on the principle of equal pay for equal work. Pay ranges within the compensation plan shall be determined with regard to factors including, but not limited to: training and ability; level of work; physical demands; independence of actions; supervision exercised; experience required; human relations skills; working conditions or hazards and impact of errors; and prevailing rates of pay for similar jobs in public and private employment as determined by the City.

B. ENTRANCE PAY RATE

The entrance pay rate shall be within 60% of the minimum of the pay range. All appointments (including department heads) above the 60% must be authorized, in advance, by a majority of the Mayor, Human Resources Committee Chair and Human Resources Director.

C. RECLASSIFICATION

The Position Classification Review Process is the method for determining pay range assignment of new positions or reclassification actions involving substantial changes in the duties and responsibilities of an existing position or external market changes.

(a) Classification or Reclassification Consideration

A request for reclassification of a current position or the classification of a new position may be initiated by a department director, or by the Human Resource Director. Requests for reclassifications may occur throughout the year as positions are created or become vacant.

Reclassification consideration for existing positions requires that the employee and the department director document substantial changes in existing duties since the most recent review. Duty changes may be from substantial, immediate reassignment of duties due to reorganization, or may be the result of a logical and gradual change of responsibilities over a period of time.

To be considered for reclassification, changes should be stable and typically should have been in effect for at least six months preceding the reclassification request so that it is clear that the changes that exist are likely to remain for some period of time. Reclassification will not be considered for temporary changes in duties.

A request for classification or reclassification consideration must be in writing to the Human Resources Generalist. The Human Resources Generalist will guide the appropriate process for a review.

(b) Review of Requests

Following internal review by the Human Resource Director, the Human Resource Generalist will submit the PAQ and any supporting documentation to the consultant for evaluation if the criteria for reclassification is met. If the recalassification is appropriate, the consultant will recommend a grade assignment for the position. The consultant may request further information.

(c) The Employer's Response to the Consultant's Recommendations

The employee and the department director will be informed of the final decision in writing. The effective date of any compensation changes will be based on the specific circumstance of the reclassification.

D. COMPENSATION PLAN COMPONENTS

(a) Pay Plan Adjustment

Pay Plan adjustments are typically made on an annual basis. The Human Resources Director shall recommend such adjustments to the Mayor and Finance Director based on the general level of pay adjustments in the relevant job markets where the City competes. These adjustments are also made in consideration of general changes in cost-of-living indices.

The adjustment takes the form of an adjustment to pay plan with the goal of maintaining market competitiveness of the pay plan.

No increase will be made to an employee's pay as a result of a pay plan adjustment.

(b) Merit increase

The amount allocated for merit increase shall be established each year by the Mayor and included in the annual budget, subject to approval by the Common Council. Merit increases will be awarded to all employees that meet or exceed their goals and departmental expectations.

E. PAY RATE ADJUSTMENTS

The Human Resources Director and the applicable Department Director shall determine the pay status of an employee based on the following:

- (a) Transfers - When an employee is transferred from one class to another with a common pay range, the employee shall continue to receive the same pay rate unless a different rate is deemed appropriate.
- (b) Promotion - When an employee is promoted from one class to another having a higher pay range, the employee shall receive an increase as deemed appropriate. For consideration of placement into the new pay range, such factors as the average value of overtime lost, average

value of extra hours worked in a non-exempt capacity as well as other internal and external factors shall be considered.

- (c) Demotion - When an employee accepts a position in a lower pay grade for any reason, a rate of pay shall be determined. For consideration of placement into the new salary range, such factors as experience, qualification, length of service, average value of overtime lost and the level of pay similar to employees in the pay range shall be considered.
- (d) Upward Re-Classification - When an employee's position is reclassified into a higher pay grade, the reclassification shall be treated the same as a promotion under (b) above.
- (e) Downward Re-Classification - When an employee's position is reclassified into a lower pay grade, the reclassification shall be treated the same as (c.) above.
- (f) Equity Adjustments
Equity adjustments are salary changes outside of the normal salary programs (as listed above) to remedy salary issues such as external pressure in high demand areas, internal salary compression, and/or retention considerations. Equity adjustments may also be used when additional duties are added.

F. MINIMUM AND MAXIMUM RATES

Generally, an employee shall be paid within the pay range of their position. **Library substitute positions may only advance to the midpoint of the pay scale.**

An employee may be paid below the minimum of their pay range as the result of not receiving a pay adjustment due to their performance.

An employee who receives a base pay adjustment cannot exceed the maximum of their pay range. **An employee who is at the maximum of their pay range may be eligible for a lump sum payment as a method to recognize performance.**

In the event of a reclassification, or re-evaluation of a pay range that results in an employee's pay falling outside the maximum of the newly assigned pay range, such employee's pay rate may be red-circled.

G. OVERTIME

- (a) Employees in the Compensation Plan who meet the exemption under the Fair Labor Standards Act shall be exempt from all premium pay provisions except as otherwise outlined in this policy.
- (b) Employees who are required to work Sunday, not part of their regular schedule, shall receive double time pay. Utility Department employees who work Sunday, as part of their regular schedule, shall receive double time pay.
- (c.) All non-represented non-exempt employees in the Compensation Plan shall be paid no less than the minimum compensation required pursuant to the FLSA, including overtime compensation on a time and one half basis, for all hours worked in excess of 40 hours per week subject to the following:
 - 1. Compensatory Time, Sick leave, PTO Sick, approved non-paid leave and FMLA non-paid leave hours shall not be counted as hours worked for purposes of computing overtime compensation; and,
 - 2. Scheduled City holiday hours, vacation, PTO , funeral leave, jury duty and

approved paid FMLA leave (except PTO Sick, see #1 above) may be counted as hours worked for purposes of computing overtime compensation (except when employee is called to work, then see #3 below); and,

3. Hours worked and paid at a Sunday or Holiday double time rate*, where the employee is also paid an additional call pay premium, shall not be counted as hours worked for purposes of computing overtime compensation.

*Holiday double time rate refer to Fringe Benefit Policy.

- (c) Battalion Chiefs and Deputy Fire Chiefs who fill in for other Chief Officers, when overtime would otherwise be required, shall receive straight time pay for all such hours worked in addition to their regular bi-weekly rate. Operations Battalion Chiefs who are required by the Chief to attend extended (generally more than four (4) hours) training on their off-duty time may be eligible for straight time pay for attendance at such training at the discretion of the Fire Chief.
- (d) Police Lieutenants and Captains will receive compensation at time and one half of the top senior sergeant rate when working beyond their normal schedule for Grants, Off-Duty Police Services, Avenue Detail, **SWAT related incidents, major case investigations** and special events.
- (e) Overtime shall be approved in advance by the Department Director or supervisor and reviewed periodically by the Department Director. Overtime shall be kept to a minimum and shall be utilized to relieve specific occasional peak workloads or emergencies.

H. SHIFT PREMIUM

Non-exempt employees shall be eligible for a \$.50 shift premium added to their base pay if the employee is regularly scheduled (through shift selection or designated assignment) to work a 2nd or 3rd shift schedule (3rd or 4th shift schedule for Police).

I. TELEPHONE CALL

Non-exempt employees who are called by a supervisor on the telephone, outside of their regularly scheduled hours, to provide information related to the operation of the department shall be paid for the time actually spent on the telephone, but not less than one hour's straight time. This does not apply to employees receiving the Stand-by Duty pay.

J. EMERGENCY CALL-IN

Non-exempt employees who have left the worksite or are in a paid leave status, and who are called to return to work outside of their regularly scheduled hours to handle emergency situations that could not be anticipated, will be eligible for a lump sum of \$100 as call-in pay.

K. ASSIGNED SHIFT CHANGE

- (a) This applies to Utilities employees who operate on shifts.

When a non-exempt employee is required to work outside their assigned shift the employee will be paid as follows:

Employees notified for a change of assigned shift for a duration of more than one week and are given 48 hours or more notice shall be paid \$1.00 per hour, added to their base pay, for all hours worked for the duration of the scheduled shift.

Employees notified for a change of assigned shift for a duration of one week or less and are given 48 hours or more notice shall be paid \$2.00 per hour, added to their base pay, for all hours worked for the duration of the scheduled shift.

Employees notified for a change of assigned shift and are given less than a 48 hour notice shall be paid \$50 per day for the first 48 hours and then the employee shall be paid pursuant to the above.

The \$1.00 and \$2.00 premium pay shall be added to the employee's regular base rate for purposes of calculating the overtime rate.

- (b) This applies to Department of Public Works and Parks Recreation Facilities Management employees who operate on shifts.

When a non-exempt employee is required to work outside their assigned shift the employee will be paid as follows:

Employees notified for a change of assigned shift shall be paid \$50 per day.

L. STAND-BY DUTY

Employees who are required by their department director to be on stand-by duty (required to remain within a one (1) hour response area, accessible by phone or pager, etc.) shall receive one hour's pay for each day of stand-by and (2) two hours if on the actual holiday (does not include the observed holiday).

All employees required to be on stand-by must remain physically fit and ready for duty and must continue to abide by City policies (i.e., Drug-Free Workplace).

M. CALL DUTY - EMERGENCY RESPONSE (Excludes Directors, Deputy Directors, Assistant Police Chief, Police Captains, and Police Lieutenants)

Any exempt employee, not on Stand By Duty, who is required to report to duty for emergency operations (e.g. snowplowing, water main breaks, facilities and grounds and technology issues, storms & other disasters) may be eligible for additional compensation in the form of a bonus as outlined below:

- ◆ If the employee reports for work and works less than three (3) hours, the employee shall be entitled to \$75.00 for each report.
- ◆ If the employee reports for work and works between 3-5 hours, the employee shall be entitled to \$200.00 for each report.
- ◆ If the employee reports for work and works between 5-8 hours, the employee shall be entitled to \$400.00 for each report
- ◆ If the employee reports for work and works more than 8 hours, the employee shall be entitled to \$500.00 for each report

CITY OF APPLETON POLICY	TITLE: SEASONAL EMPLOYMENT	
ISSUE DATE:	LAST UPDATE: October 17, 2022	SECTION: Human Resources
POLICY SOURCE: Human Resources Department	AUDIENCE: All Employees	TOTAL PAGES: 11
Reviewed by Legal Services Date:	Committee Approval Date:	Council Approval Date:

I. PURPOSE

To provide guidelines in the seasonal employment process including recruitment and selection, training, and performance evaluation.

II. POLICY

The City of Appleton will recruit and select the best qualified persons for positions with the City. The Human Resources Department, under the guidance of the Human Resources Director, is responsible for developing and facilitating an active seasonal recruitment and selection program designed to meet the current and anticipated City departments' seasonal employment needs. The procedure will be consistent with the City's Affirmative Action Program and will comply with all Equal Employment Opportunity guidelines.

III. DISCUSSION

The City of Appleton establishes clear and consistent guidelines to assist City supervisors and to ensure equal and unbiased treatment of all applicants and employees. The selection of seasonal employees shall be made by the respective hiring supervisor and in conjunction with the established guidelines.

IV. DEFINITIONS

- A. Seasonal Employment: Certain times of the year necessitate the hiring of temporary, non-benefited positions to assist with increased workloads or to fill recreational program activity positions. These positions shall be consistent with the seasonal pay plan and shall be for a specific time period.
- B. Seasonal Employee: Employees hired to perform seasonal work for a specific time period. Seasonal employees shall not exceed 1200 hours in any 12-month period and are not eligible for benefits. Employment terminates at the end of the season.

V. PROCEDURES

A. Recruitment

When it is determined to be in the best interest of the City of Appleton, seasonal employees may be hired as budgeted. Such employees shall not be eligible to receive City of Appleton fringe benefits unless specifically provided for elsewhere in this policy. The department shall establish job descriptions for each seasonal position within their department and pay rates will be established and approved by Human Resources and the Common Council as referred on the seasonal pay plan.

Hours – No seasonal employee shall exceed 1200 hours of employment in any 12-month period, unless previously authorized by the Human Resources Director. The Human Resources Benefits Coordinator will monitor the number of hours that a seasonal employee has worked and will notify a department if close to the hour limits. Seasonal employees shall not work more than 40 hours per week unless authorized by the Department Head. All hours worked over 40 must be paid at time and one-half.

1. Advertising and Publicity

The Human Resources Department shall post the open positions on the City's website to accept applications for the seasonal position vacancies. A list of the open positions may also be sent to regional high schools, Wisconsin technical colleges and universities, and diversity groups, along with other resources customarily used to distribute regular weekly Open Positions Lists and/or are deemed to be appropriate by the department.

2. Application Forms

All City of Appleton seasonal applications for employment must be completed on-line. Resumes will be accepted only as an attachment to the application; not in lieu of an application. Each returning seasonal employee must update their application annually.

3. Applicant Tracking

Once the applications are submitted via the City's website, the applications will then be forwarded electronically to the hiring supervisor.

4. Candidate Selection

The hiring supervisor will screen the applications based on the job requirements outlined in the job description. After selections are made, candidates will be scheduled for an interview. Interviews can be conducted over the phone or in person. All candidates will be asked the same general questions. Supervisors should refer to their Seasonal Hiring binders for information on conducting interviews. All applicants not chosen from the initial screening will be notified by email.

5. Reference Checks

The hiring supervisor will decide on their final candidate(s). Depending on the position, the hiring supervisor will obtain employment and/or personal references. (Exhibit 1a and 1b).

6. Conditional Offer of Employment

The hiring supervisor will make the job offer contingent upon appropriate background checks using the existing seasonal pay structure.

7. Background Checks

The necessary information to conduct a background check shall be sent to Human Resources. HR Administrative staff will process the background check.

8. Offer Letter

The HR department will prepare a conditional offer letter, contingent on the successful completion of a background check after the supervisor determines a start date and end date (or annual background refresher date) with the candidate. The conditional offer letter will be sent with the appropriate instructions for paperwork that the employee must complete on or before the first day of employment. The required paperwork could include: I-9 form, W-4 form,

ACH Direct Deposit Authorization (all seasonal employees are required to sign-up for direct deposit of their payroll checks), and a Child Labor Permit (if applicable) a policy sign off sheet and policy brochure, and any other required paperwork. (The City reimburses employees for the child labor permit.)

B. Auto Insurance

The City does not provide insurance coverage for an employee's privately-owned vehicle. Employees who use non-City-owned vehicles for City business should confirm that their personal auto insurance policy provides coverage for this use.

All employees who drive non-City-owned vehicles for City business shall be required to purchase (at their own expense) and maintain auto insurance at a level that meets one of the following minimum standards:

The minimum acceptable coverage is:

Single limit of liability - \$200,000 for bodily injury and property damage

OR

Split limit of liability with limits of \$100,000 each person bodily injury,

\$300,000 each accident bodily injury, \$50,000 property damage

All seasonal employees are required to sign the Driver's License Information Update form (Exhibit 2) if they are required to use their own vehicle for City business and/or if they will be using a City-provided vehicle.

A seasonal employee must be 18 years of age to drive a vehicle for City business.

C. Seasonal Employee Orientation and Training

1. The department supervisor should follow the Seasonal Employee Orientation Checklist to orient the new employee(s). (Exhibit 3)
2. The Staff Training and Development Coordinator for the Human Resources Department will coordinate the necessary policy training with each of the department supervisors.
3. Once a new seasonal employee is hired, he/she should attend one of the scheduled training courses. The employee's supervisor is responsible for notifying employees of the training dates and confirming the employee's attendance with the Human Resources Department. The courses include the training that is required by federal and state law and City policy. At the end of each training course, the employee will be asked to sign a form stating that he/she took the class and understands that he/she must abide by the policies covered in it.
4. If the employee cannot attend the training course, the supervisor will be responsible for sending a required training brochure, along with a sign-off form to the employee. The employee is required to return the signed form to their supervisor prior to beginning his/her job. All hard copies of the sign-off form will be filed with the employee's application for future reference. The Human Resources Department will keep such files on-line for all seasonal employees.

D. Evaluation Forms/Process

At the end of each employment period, the supervisor shall fill out a Seasonal Performance Evaluation Form (Exhibit 4) for each seasonal employee who worked under his/her supervision.

The supervisor shall sit down with the employee to discuss the evaluation, then obtain the employee's signature as acknowledgment of the evaluation. Supervisors who are in charge of a large number of seasonal employees may complete the evaluation and mail or email two copies to the seasonal employee, provided the employee has met the minimum performance requirements of the position. The evaluation should be accompanied by a letter (Exhibit 5) explaining the evaluation and requesting that the employee sign and return one of the copies to the supervisor. All employees who fall below minimum performance requirements must be evaluated in person. In order to be eligible for re-hire, the employee must have a prior year satisfactory evaluation on file. Seasonal staff evaluations are kept electronically. If an employee receives a "not eligible for re-hire" evaluation, the supervisor will meet with the employee to discuss the details. It is the supervisor's responsibility to track this for future years. Supervisors from other programs/departments have access to see these evaluations from former years.

E. Seasonal Pay Schedule

Seasonal employment shall be compensated on a per hour or per event basis at a rate established by the Human Resources Director and approved by the Common Council.

TELEPHONE REFERENCE FORM

EXHIBIT 1a

Name of applicant: _____

Current/previous employer: _____

Employment dates: _____ Full time: _____ Part time: _____

Job title/summary of duties: _____

Quality of work: _____

Dependability/follow through on assignments: _____

Initiative: _____

Ability to work with others: _____

Attendance/punctuality: _____

Any concerns in the area of violence: _____

Any concerns in the area of harassment: _____

Has this person ever had a positive drug test: _____

Reason for leaving: _____

Eligible for rehire: _____

Areas of strength: _____

If you were to coach in one area, what would it be: _____

Recommend for hire for this position: _____

Additional remarks: _____

Name/title of person giving reference: _____

Caller: _____ Date: _____

SEASONAL EMPLOYMENT
TELEPHONE REFERENCE FORM

EXHIBIT 1b

Name of applicant: _____

Name & title/relationship of person giving reference: _____

Caller: _____ Date: _____

Job title or nature of relationship to applicant (i.e. teacher, coach): _____

Quality of work/assignments: _____

Dependability/follow through on tasks or assignments: _____

Ability to work with others: _____

Attendance/punctuality: _____

Additional remarks or anything you would like to share about this individual? _____

Use the following only if the contact is from a previous employer

Reason for leaving: _____

Eligible for rehire/would you hire them again? _____

Any concerns in the area of violence or harassment: _____

Has this person ever had a positive drug test at work: _____

DRIVER'S LICENSE INFORMATION UPDATE _____

Please print CLEARLY

First Name: _____ Middle Initial: _____

Last Name: _____

Do you have a valid Driver's License? Yes No

Date your Driver's License expires (mm/dd/year): ____/____/____

List any restrictions on your Driver's License (i.e. glasses, occupational, etc.):

It is your responsibility to notify Human Resources or your Supervisor immediately when your driver's license is restricted, suspended or revoked. Failure to do so may result in disciplinary action up to and including discharge.

Signature Department Date

AUTO INSURANCE

The City does not provide insurance coverage for an employee's privately owned vehicle. Employees who use non-City-owned vehicles for City business should confirm that their personal auto insurance policy provides coverage for this use.

All employees who drive non-City-owned vehicles for City business shall be required to purchase (at their own expense) and maintain auto insurance at a level that meets one of the following minimum standards:

(a) Single limit of liability - \$200,000 for bodily injury and property damage

OR

(b) Split limit of liability with limits of; \$100,000 each person bodily injury \$300,000 each accident bodily injury \$50,000 property damage.

Proof of insurance must be provided prior to mileage reimbursement payment. Employees who cannot provide proof of this level of insurance will not be entitled to receive mileage reimbursement, and will not be allowed to drive for City business. Failure by the employee to maintain required insurance limits may affect employment status, as stated in the Conditions of Employment policy.

Health Department employees who are reimbursed monthly for mileage must provide regular insurance policy updates to the HR Department.

I anticipate I may drive a non-City owned vehicle in the conduct of my job duties and I understand that, should I use a non-City-owned vehicle in the conduct of my job duties, I must have and maintain adequate insurance coverage (as noted above) for that vehicle.

I do not anticipate that I may drive a non-City owned vehicle in the conduct of my job duties. However, I understand that should I need to use a non-City-owned vehicle in the conduct of my job duties, I will verify that I have adequate insurance coverage (as noted above) for that vehicle, prior to using the vehicle for my job.

Signature Department Date

SEASONAL EMPLOYEE ORIENTATION CHECKLIST

EMPLOYEE: _____ DATE: _____

DEPARTMENT: _____ SUPERVISOR: _____

TO BE COMPLETED PRIOR TO FIRST DAY OF EMPLOYMENT

Complete new hire paperwork with HR and turn-in work permit (if applicable)

TO BE COMPLETED THE FIRST WEEK OF EMPLOYMENT

<input type="checkbox"/> Review parking	<input type="checkbox"/> Review Departmental communications (i.e. Bulletin board, staff meetings, etc.)
<input type="checkbox"/> Schedule seasonal training with HR or have employee read and sign the Seasonal Training Brochure	<input type="checkbox"/> Review Departmental Activities (i.e. Casual Fridays)
<input type="checkbox"/> Fire Drill/Evacuation Procedure	<input type="checkbox"/> Show video of department, if applicable
<input type="checkbox"/> Issue PPE (Personal Protective Equipment)	<input type="checkbox"/> Discuss performance evaluation format, if any
<input type="checkbox"/> Issue keys, if applicable	<input type="checkbox"/> Fill out applicable employment forms (if required by specific department)
<input type="checkbox"/> Employee Introductions	<input type="checkbox"/> Train employee on applicable equipment
<input type="checkbox"/> Office/Facility Tour	<input type="checkbox"/> Train employee on phone system
<input type="checkbox"/> Review of work rules, departmental policies, etc.	<input type="checkbox"/> Review Department policy on public relations
<input type="checkbox"/> Review of reporting requirements	<input type="checkbox"/> Review Chain of Command
<input type="checkbox"/> Review of work hours, time cards (if applicable), and location	<input type="checkbox"/> Review of Department Mission and Beliefs
<input type="checkbox"/> Review job description	<input type="checkbox"/> Review all departmental safety/compliance issues
<input type="checkbox"/> Give job assignment	

EMPLOYEE SIGNATURE: _____ DATE: _____

SUPERVISOR SIGNATURE: _____ DATE: _____

SEASONAL PERFORMANCE EVALUATION FORM

Department: Parks & Recreation Employee: _____ Job Title: _____ Date: _____

Please complete the following evaluation near the end of the employment period and review it with the employee prior to the end of his/her employment. Place an 'X' in the box which best indicates employee performance.

Area of Evaluation (X-out those that do not pertain)	Excep- tional	Exceeds Require- ments	Meets Require- ments	Needs Improvement	Unsatis- factory	Comments
Job Knowledge - Consider how well employee understood duties and re-tained and applied knowledge						
Quality of Work - Consider neatness, accuracy and effectiveness						
Quantity of Work - Consider amount and speed of work output, timeliness						
Cooperation - Consider employee's ability to work effectively with others						
Dependability - Consider employee's ability to complete job assignments						
Attendance - Consider employee's punctuality and attendance						
Initiative - Consider employee's willingness to help others and seek out work and perform tasks assigned						
Attitude - Was the employee's attitude positive, professional and supportive of the City						

DETERMINATION OF OVERALL EVALUATION (Please choose one)

Demonstrates consistent exceptional performance. Far exceeds requirements of position.
 Consistently exceeds requirements of position.
 Consistently meets requirements of position.
 Meets minimum requirements of position. Indicates need for improvement.
 Consistently falls below minimum requirements of position.

Do not rehire in this position Not eligible for rehire within department

Is employee eligible for rehire? Yes No

Number of years in this position: _____

EVALUATOR COMMENTS: _____

Employee: This performance review has been completed as a guide to help you in your job performance and development. Your signature does not necessarily imply you agree with the comments or rating, but that you read and understand the review.

Employee Signature _____ Date _____ Evaluator Signature _____ Date _____

EMPLOYEE: PLEASE USE REVERSE SIDE FOR COMMENTS. Supervisor Signature _____ Date _____

**Appleton Parks Recreation
and Facilities Management**
1819 Witzke Boulevard
Appleton, WI 54911
Phone: (920) 832-5905
Fax: (920) 832-5950

“Date”

“First Name” “Last Name”

“Address”

“City”, “State” “Zip Code”

Dear “First Name”,

I would like to thank you for your hard work and effort put forth this past summer for the Appleton Parks Recreation and Facilities Management Department. Your time and dedication is greatly appreciated and made this year a rewarding and memorable one.

Enclosed you will find your employee evaluation for this year’s program. Please read, sign, and return a copy for our files. Keep a copy for your personal records. If you have any questions regarding your evaluation, please feel free to call me at (920) 832-3926.

Sincerely,

Recreation Program Supervisor
Appleton Parks Recreation and
Facilities Management Department

Enclosure

Naming ~~Rights-Opportunities~~ Policy

I. Purpose

The Appleton Public Library Board of Trustees (the “Board”) welcomes mission-compatible financial support from the community when it is within the best interests of the library.

The Board considers the granting of Naming ~~Rights-Opportunities~~ the highest distinctions it can bestow.

While all donors to the ~~[insert name of capital campaign]~~ Building Beyond Words Capital Campaign will be recognized via a donor tier structure yet to be determined, this policy applies specifically to ~~N~~aming ~~rights-Opportunities~~ in connection with Appleton Public Library’s ~~[insert the name]~~ Building Beyond Words Capital Campaign. This policy establishes a procedure in which donors shall be recognized for donations that are eligible for ~~N~~aming ~~rights-Opportunities~~ within the Building Beyond Words Capital Campaign (see Attachment A: Menu of Naming ~~Rights-Opportunities~~).

The ~~[insert name of capital campaign]~~ Building Beyond Words Capital Campaign is in collaboration with the Friends of Appleton Public Library, who are carrying out the fundraising, and the City of Appleton, who is overseeing construction of the facility.

Please see the library’s Gifts and Donations Policy, or contact the Friends of Appleton Public Library, for other methods of supporting the library’s ongoing programs and services.

II. Definitions

1. Naming ~~rights-Opportunities~~ – name of room, area, collection, space, equipment, artwork, technology or other interior or exterior space in honor or memory of living or deceased individual, corporation, foundation, or organization as grateful recognition of the Donor’s gift.
2. Gift – a voluntary and irrevocable pledge paid to the Friends of Appleton Public Library in the form of a one-time contribution, or in multiple contributions over a period of several years. Stocks can also be provided as a gift. In kind gifts may be accepted should those gifts be convertible to cash or have a value to the campaign.
3. ~~[insert name of capital campaign]~~ Building Beyond Words Capital Campaign– This is a specific campaign to renovate and expand the current library.

4. Friends of Appleton Public Library (“Friends”) -The Friends are a 501(c)(3) organization whose mission is to support the library by advocating and raising funds to provide enhanced programs and services for the community.

III. Policy

- a. The Board has the sole and absolute discretion regarding Naming Rights-Opportunities.
- b. Naming rights-Opportunities will be memorialized in a Naming Rights-Opportunities Donor Agreement which will grant Donor specified Naming Rights-Opportunities to a particular space (“Named Space”), subject to acceptance of the Donor’s gift and approval of such naming by the Board and consistent with this Policy.
- c. In no event will the Donor be provided with any decision-making power over the library on operational or capital decisions, or in any other library process or activity. The Board reserves the right to refuse gifts that are not consistent with the Capital Campaign.
- d. Gifts are being made to the Friends with the understanding that it is to be used for the [insert the name] capital campaign. Should the project not proceed, be terminated, or city funds no longer be available, the donor reserves the right to rescind the gift or redirect it towards an endowment that supports library grants.
- e. Gifts will be used to enhance, not replace the City of Appleton’s existing project funding or future operational support.
- f. If the entire Gift amount is not received by the Friends as agreed upon, the Board may, in its sole discretion, remove the Donor’s recognition of the Named Space and offer the Donor an alternate recognition opportunity appropriate to the total amount of the Donor’s Gift.
- g. Holding of funds
 - i. Gifts to the capital campaign will be held by the Friends and will be segregated from other Library or Friends assets.
 - ii. These funds will be overseen by the Friends and distributed in agreement with the City and the Library Board for the purposes agreed upon.
- h. Acknowledgement
 - i. The duration of Naming Rights-Opportunities shall be a maximum of twenty (20) years and specified in the Naming Rights-Opportunities Donor Agreement, but in no event shall extend beyond the useful life of the library or the Named Space as determined by the Library Board.
 - ii. The Board reserves the right to choose the wording, size, location, and style of recognition. Visual recognition of a Named Space will adhere to library brand standards, including exterior and interior signage, logos, letterhead, and all other representations of the library’s identity.
- i. Modification
 - i. The library may make changes to signage to maintain and update facilities but will make efforts to ensure that the signage still reflects the appropriate recognition for the donor.

- ii. If during the useful life of the Named Space, the space is closed, deconstructed, destroyed, severely damaged, significantly renovated, upgraded, modified, or replaced, then the Naming ~~Rights-Opportunities~~ shall cease. The donor, if available, and in consultation with the library, will have the right to have another space named for the duration of the Naming ~~Rights-Opportunities~~ Donor Agreement.
 - iii. Donors who request changes to their recognition signage will be considered by the Board. Changes that require additional expense will be done at the donor's expense.
- j. Termination of Naming. The Board reserves the right to alter or terminate a Naming ~~Rights-Opportunities~~ Donor Agreement in the following cases:
 - i. In the event of the default in payment of the gift, or
 - ii. In the unusual circumstance that the Board determines in its reasonable and good faith opinion that circumstances have changed such that accepting the gift, or the Naming chosen by the Donor would adversely affect the reputation, image, mission or integrity of the Library or the City of Appleton should there be continued association with the Donor and the continued Naming.
 - iii. Should the Naming ~~Rights-Opportunities~~ Donor Agreement be terminated, the Board, the library and the City of Appleton shall have no further obligation or liability to the Donor and shall not be required to return any portion of the gift that has already been paid. The Board may choose an alternative recognition for the portion of the gift that has been received in its sole discretion.
- k. Procedure
 - i. All ~~N~~aming ~~rights-Opportunities~~ must be approved by the Board in accordance with the Naming ~~Rights-Opportunities~~ Donor Agreement. The Library Director will provide a written summary of the ~~N~~aming ~~rights-Opportunities~~ that are recommended for approval including:
 - 1. The name of the donor and how they would like to be publicly acknowledged.
 - 2. The amount of the gift. Should the gift be a multi-year pledge, details including the dates and amounts of each gift should be itemized.
 - ii. Upon approval by the Board, a Naming ~~Rights-Opportunities~~ Donor Agreement shall be finalized and signed by the Library Board President and a donor representative.

Reviewed by the Friends Steering Committee 4/12/2022

Approved by APL Board of Trustees 4/19/2022; 11/2022

CITY OF APPLETON POLICY	TITLE: SEASONAL EMPLOYMENT	
ISSUE DATE:	LAST UPDATE: October 17, 2022	SECTION: Human Resources
POLICY SOURCE: Human Resources Department	AUDIENCE: All Employees	TOTAL PAGES: 11
Reviewed by Legal Services Date:	Committee Approval Date:	Council Approval Date:

I. PURPOSE

To provide guidelines in the seasonal employment process including recruitment and selection, training, and performance evaluation.

II. POLICY

The City of Appleton will recruit and select the best qualified persons for positions with the City. The Human Resources Department, under the guidance of the Human Resources Director, is responsible for developing and facilitating an active seasonal recruitment and selection program designed to meet the current and anticipated City departments' seasonal employment needs. The procedure will be consistent with the City's Affirmative Action Program and will comply with all Equal Employment Opportunity guidelines.

III. DISCUSSION

The City of Appleton establishes clear and consistent guidelines to assist City supervisors and to ensure equal and unbiased treatment of all applicants and employees. The selection of seasonal employees shall be made by the respective hiring supervisor and in conjunction with the established guidelines.

IV. DEFINITIONS

- A. Seasonal Employment: Certain times of the year necessitate the hiring of temporary, non-benefited positions to assist with increased workloads or to fill recreational program activity positions. These positions shall be consistent with the seasonal pay plan and shall be for a specific time period.
- B. Seasonal Employee: Employees hired to perform seasonal work for a specific time period. Seasonal employees shall not exceed 1200 hours in any 12-month period and are not eligible for benefits. Employment terminates at the end of the season.

V. PROCEDURES

A. Recruitment

When it is determined to be in the best interest of the City of Appleton, seasonal employees may be hired as budgeted. Such employees shall not be eligible to receive City of Appleton fringe benefits unless specifically provided for elsewhere in this policy. The department shall establish job descriptions for each seasonal position within their department and pay rates will be established and approved by Human Resources and the Common Council as referred on the seasonal pay plan.

Hours – No seasonal employee shall exceed 1200 hours of employment in any 12-month period, unless previously authorized by the Human Resources Director. The Human Resources Benefits Coordinator will monitor the number of hours that a seasonal employee has worked and will notify a department if close to the hour limits. Seasonal employees shall not work more than 40 hours per week unless authorized by the Department Head. All hours worked over 40 must be paid at time and one-half.

1. Advertising and Publicity

The Human Resources Department shall post the open positions on the City's website to accept applications for the seasonal position vacancies. A list of the open positions may also be sent to regional high schools, Wisconsin technical colleges and universities, and diversity groups, along with other resources customarily used to distribute regular weekly Open Positions Lists and/or are deemed to be appropriate by the department.

2. Application Forms

All City of Appleton seasonal applications for employment must be completed on-line. Resumes will be accepted only as an attachment to the application; not in lieu of an application. Each returning seasonal employee must update their application annually.

3. Applicant Tracking

Once the applications are submitted via the City's website, the applications will then be forwarded electronically to the hiring supervisor.

4. Candidate Selection

The hiring supervisor will screen the applications based on the job requirements outlined in the job description. After selections are made, candidates will be scheduled for an interview. Interviews can be conducted over the phone or in person. All candidates will be asked the same general questions. Supervisors should refer to their Seasonal Hiring binders for information on conducting interviews. All applicants not chosen from the initial screening will be notified by email.

5. Reference Checks

The hiring supervisor will decide on their final candidate(s). Depending on the position, the hiring supervisor will obtain employment and/or personal references. (Exhibit 1a and 1b).

6. Conditional Offer of Employment

The hiring supervisor will make the job offer contingent upon appropriate background checks using the existing seasonal pay structure.

7. Background Checks

The necessary information to conduct a background check shall be sent to Human Resources. HR Administrative staff will process the background check.

8. Offer Letter

The HR department will prepare a conditional offer letter, contingent on the successful completion of a background check after the supervisor determines a start date and end date (or annual background refresher date) with the candidate. The conditional offer letter will be sent with the appropriate instructions for paperwork that the employee must complete on or before the first day of employment. The required paperwork could include: I-9 form, W-4 form,

ACH Direct Deposit Authorization (all seasonal employees are required to sign-up for direct deposit of their payroll checks), and a Child Labor Permit (if applicable) a policy sign off sheet and policy brochure, and any other required paperwork. (The City reimburses employees for the child labor permit.)

B. Auto Insurance

The City does not provide insurance coverage for an employee's privately-owned vehicle. Employees who use non-City-owned vehicles for City business should confirm that their personal auto insurance policy provides coverage for this use.

All employees who drive non-City-owned vehicles for City business shall be required to purchase (at their own expense) and maintain auto insurance at a level that meets one of the following minimum standards:

The minimum acceptable coverage is:

Single limit of liability - \$200,000 for bodily injury and property damage

OR

Split limit of liability with limits of \$100,000 each person bodily injury,

\$300,000 each accident bodily injury, \$50,000 property damage

All seasonal employees are required to sign the Driver's License Information Update form (Exhibit 2) if they are required to use their own vehicle for City business and/or if they will be using a City-provided vehicle.

A seasonal employee must be 18 years of age to drive a vehicle for City business.

C. Seasonal Employee Orientation and Training

1. The department supervisor should follow the Seasonal Employee Orientation Checklist to orient the new employee(s). (Exhibit 3)
2. The Staff Training and Development Coordinator for the Human Resources Department will coordinate the necessary policy training with each of the department supervisors.
3. Once a new seasonal employee is hired, he/she should attend one of the scheduled training courses. The employee's supervisor is responsible for notifying employees of the training dates and confirming the employee's attendance with the Human Resources Department. The courses include the training that is required by federal and state law and City policy. At the end of each training course, the employee will be asked to sign a form stating that he/she took the class and understands that he/she must abide by the policies covered in it.
4. If the employee cannot attend the training course, the supervisor will be responsible for sending a required training brochure, along with a sign-off form to the employee. The employee is required to return the signed form to their supervisor prior to beginning his/her job. All hard copies of the sign-off form will be filed with the employee's application for future reference. The Human Resources Department will keep such files on-line for all seasonal employees.

D. Evaluation Forms/Process

At the end of each employment period, the supervisor shall fill out a Seasonal Performance Evaluation Form (Exhibit 4) for each seasonal employee who worked under his/her supervision.

The supervisor shall sit down with the employee to discuss the evaluation, then obtain the employee's signature as acknowledgment of the evaluation. Supervisors who are in charge of a large number of seasonal employees may complete the evaluation and mail or email two copies to the seasonal employee, provided the employee has met the minimum performance requirements of the position. The evaluation should be accompanied by a letter (Exhibit 5) explaining the evaluation and requesting that the employee sign and return one of the copies to the supervisor. All employees who fall below minimum performance requirements must be evaluated in person. In order to be eligible for re-hire, the employee must have a prior year satisfactory evaluation on file. Seasonal staff evaluations are kept electronically. If an employee receives a "not eligible for re-hire" evaluation, the supervisor will meet with the employee to discuss the details. It is the supervisor's responsibility to track this for future years. Supervisors from other programs/departments have access to see these evaluations from former years.

E. Seasonal Pay Schedule

Seasonal employment shall be compensated on a per hour or per event basis at a rate established by the Human Resources Director and approved by the Common Council.

TELEPHONE REFERENCE FORM

EXHIBIT 1a

Name of applicant: _____

Current/previous employer: _____

Employment dates: _____ Full time: _____ Part time: _____

Job title/summary of duties: _____

Quality of work: _____

Dependability/follow through on assignments: _____

Initiative: _____

Ability to work with others: _____

Attendance/punctuality: _____

Any concerns in the area of violence: _____

Any concerns in the area of harassment: _____

Has this person ever had a positive drug test: _____

Reason for leaving: _____

Eligible for rehire: _____

Areas of strength: _____

If you were to coach in one area, what would it be: _____

Recommend for hire for this position: _____

Additional remarks: _____

Name/title of person giving reference: _____

Caller: _____ Date: _____

SEASONAL EMPLOYMENT
TELEPHONE REFERENCE FORM

EXHIBIT 1b

Name of applicant: _____

Name & title/relationship of person giving reference: _____

Caller: _____ Date: _____

Job title or nature of relationship to applicant (i.e. teacher, coach): _____

Quality of work/assignments: _____

Dependability/follow through on tasks or assignments: _____

Ability to work with others: _____

Attendance/punctuality: _____

Additional remarks or anything you would like to share about this individual? _____

Use the following only if the contact is from a previous employer

Reason for leaving: _____

Eligible for rehire/would you hire them again? _____

Any concerns in the area of violence or harassment: _____

Has this person ever had a positive drug test at work: _____

DRIVER'S LICENSE INFORMATION UPDATE _____

Please print CLEARLY

First Name: _____ Middle Initial: _____

Last Name: _____

Do you have a valid Driver's License? Yes No

Date your Driver's License expires (mm/dd/year): ____/____/____

List any restrictions on your Driver's License (i.e. glasses, occupational, etc.):

It is your responsibility to notify Human Resources or your Supervisor immediately when your driver's license is restricted, suspended or revoked. Failure to do so may result in disciplinary action up to and including discharge.

Signature Department Date

AUTO INSURANCE

The City does not provide insurance coverage for an employee's privately owned vehicle. Employees who use non-City-owned vehicles for City business should confirm that their personal auto insurance policy provides coverage for this use.

All employees who drive non-City-owned vehicles for City business shall be required to purchase (at their own expense) and maintain auto insurance at a level that meets one of the following minimum standards:

(a) Single limit of liability - \$200,000 for bodily injury and property damage

OR

(b) Split limit of liability with limits of; \$100,000 each person bodily injury \$300,000 each accident bodily injury \$50,000 property damage.

Proof of insurance must be provided prior to mileage reimbursement payment. Employees who cannot provide proof of this level of insurance will not be entitled to receive mileage reimbursement, and will not be allowed to drive for City business. Failure by the employee to maintain required insurance limits may affect employment status, as stated in the Conditions of Employment policy.

Health Department employees who are reimbursed monthly for mileage must provide regular insurance policy updates to the HR Department.

I anticipate I may drive a non-City owned vehicle in the conduct of my job duties and I understand that, should I use a non-City-owned vehicle in the conduct of my job duties, I must have and maintain adequate insurance coverage (as noted above) for that vehicle.

I do not anticipate that I may drive a non-City owned vehicle in the conduct of my job duties. However, I understand that should I need to use a non-City-owned vehicle in the conduct of my job duties, I will verify that I have adequate insurance coverage (as noted above) for that vehicle, prior to using the vehicle for my job.

Signature Department Date

SEASONAL EMPLOYEE ORIENTATION CHECKLIST

EMPLOYEE: _____ DATE: _____

DEPARTMENT: _____ SUPERVISOR: _____

TO BE COMPLETED PRIOR TO FIRST DAY OF EMPLOYMENT

Complete new hire paperwork with HR and turn-in work permit (if applicable)

TO BE COMPLETED THE FIRST WEEK OF EMPLOYMENT

<input type="checkbox"/> Review parking	<input type="checkbox"/> Review Departmental communications (i.e. Bulletin board, staff meetings, etc.)
<input type="checkbox"/> Schedule seasonal training with HR or have employee read and sign the Seasonal Training Brochure	<input type="checkbox"/> Review Departmental Activities (i.e. Casual Fridays)
<input type="checkbox"/> Fire Drill/Evacuation Procedure	<input type="checkbox"/> Show video of department, if applicable
<input type="checkbox"/> Issue PPE (Personal Protective Equipment)	<input type="checkbox"/> Discuss performance evaluation format, if any
<input type="checkbox"/> Issue keys, if applicable	<input type="checkbox"/> Fill out applicable employment forms (if required by specific department)
<input type="checkbox"/> Employee Introductions	<input type="checkbox"/> Train employee on applicable equipment
<input type="checkbox"/> Office/Facility Tour	<input type="checkbox"/> Train employee on phone system
<input type="checkbox"/> Review of work rules, departmental policies, etc.	<input type="checkbox"/> Review Department policy on public relations
<input type="checkbox"/> Review of reporting requirements	<input type="checkbox"/> Review Chain of Command
<input type="checkbox"/> Review of work hours, time cards (if applicable), and location	<input type="checkbox"/> Review of Department Mission and Beliefs
<input type="checkbox"/> Review job description	<input type="checkbox"/> Review all departmental safety/compliance issues
<input type="checkbox"/> Give job assignment	

EMPLOYEE SIGNATURE: _____ DATE: _____

SUPERVISOR SIGNATURE: _____ DATE: _____

SEASONAL PERFORMANCE EVALUATION FORM

Department: Parks & Recreation Employee: _____ Job Title: _____ Date: _____

Please complete the following evaluation near the end of the employment period and review it with the employee prior to the end of his/her employment. Place an 'X' in the box which best indicates employee performance.

Area of Evaluation (X-out those that do not pertain)	Excep- tional	Exceeds Require- ments	Meets Require- ments	Needs Improvement	Unsatis- factory	Comments
Job Knowledge - Consider how well employee understood duties and re-tained and applied knowledge						
Quality of Work - Consider neatness, accuracy and effectiveness						
Quantity of Work - Consider amount and speed of work output, timeliness						
Cooperation - Consider employee's ability to work effectively with others						
Dependability - Consider employee's ability to complete job assignments						
Attendance - Consider employee's punctuality and attendance						
Initiative - Consider employee's willingness to help others and seek out work and perform tasks assigned						
Attitude - Was the employee's attitude positive, professional and supportive of the City						

DETERMINATION OF OVERALL EVALUATION (Please choose one)

- Demonstrates consistent exceptional performance. Far exceeds requirements of position.
- Consistently exceeds requirements of position.
- Consistently meets requirements of position.
- Meets minimum requirements of position. Indicates need for improvement.
- Consistently falls below minimum requirements of position.

Do not rehire in this position

Do not rehire in this position

Yes Not eligible for rehire within department

Is employee eligible for rehire? _____
 Number of years in this position: _____

Employee: This performance review has been completed as a guide to help you in your job performance and development. Your signature does not necessarily imply you agree with the comments or rating, but that you read and understand the review.

Employee Signature _____ Date _____ Evaluator Signature _____ Date _____

EMPLOYEE: PLEASE USE REVERSE SIDE FOR COMMENTS. Supervisor Signature _____ Date _____

EVALUATOR COMMENTS:

**Appleton Parks Recreation
and Facilities Management**
1819 Witzke Boulevard
Appleton, WI 54911
Phone: (920) 832-5905
Fax: (920) 832-5950

“Date”

“First Name” “Last Name”

“Address”

“City”, “State” “Zip Code”

Dear “First Name”,

I would like to thank you for your hard work and effort put forth this past summer for the Appleton Parks Recreation and Facilities Management Department. Your time and dedication is greatly appreciated and made this year a rewarding and memorable one.

Enclosed you will find your employee evaluation for this year’s program. Please read, sign, and return a copy for our files. Keep a copy for your personal records. If you have any questions regarding your evaluation, please feel free to call me at (920) 832-3926.

Sincerely,

Recreation Program Supervisor
Appleton Parks Recreation and
Facilities Management Department

Enclosure



APPLETON PUBLIC LIBRARY
2411 S. Kensington Drive
Appleton, WI 54915
920-832-6170

**TO: Members of the Appleton Public Library Board of Trustees
Members of the City of Appleton Common Council**
**FROM: Dean Gazza, Director of Parks Recreation and Facilities Management
Colleen Rortvedt, Library Director**
DATE: November 2, 2022
RE: November Library Building Project Update

When the City of Appleton and the Appleton Public Library set out on the redesign and renovation of the library building, we identified seven principles to guide our work. Among the principles were to “steward existing community investments” and to “deliver a cost-effective plan, maximizing taxpayer value while meeting community needs.”

The September bid opening for the construction of a redesigned library revealed costs escalated beyond the project team’s most conservative estimations. The project team recommended the City of Appleton Common Council reject all bids, allowing the team to rework the design and scope to re-bid the project. The Common Council rejected all bids at their October 5 meeting.

Project Progress

City staff, The Boldt Company (Boldt) and Skidmore, Owings and Merrill (SOM) are reviewing the current design to reduce and/or modify the scope of the project.

Meetings have been held with trade contractors to obtain recommendations and information about the current market and the effects on cost, lead times and potential alternatives. Meetings to date include timber structures and concrete; metal panels and glazing; electrical; HVAC; doors, frames and hardware; and carpentry. Additional meetings are being scheduled.

Potential areas of change to the project include:

- Reduced excavation
- Potential use of steel versus wood structure
- Lighting upgrades
- HVAC system including Geo-Thermal
- Reallocation of spaces for shared usage
- Landscape adjustments

- Redesign of staircases

Timeline

The current timeline is below. Please remember the schedule may be impacted by many factors including lead time for products, supply chain, weather, etc.

- Fall 2022 – Value Engineering and Redesign Scope Development
- Early 2023 – Project Goes to Bid
- Spring 2023 - Construction Starts
- Opening Day - TBD

Communication

We continue to promote our building project webpage – apl.org/building - as a place for community members to find information related to the project. The webpage includes monthly updates, project FAQs, project spotlights (such as parking, plans and permits, etc.), and an area to provide feedback/questions.

Capital Campaign

Friends continues to work with the Capital Campaign Committee to cultivate private philanthropic support for the library building project and keep potential donors informed of the city's approach to deliver a cost-effective plan.

Plans for the public phase of the campaign will shift to align with the city's updated timeline, bid process and groundbreaking.

Stay up to date on the library building project or sign up for email updates by visiting apl.org/building.

Adult Classes and Events

Charcoal Plein Air Workshop

Working with the direction of artist Nathaniel Brandner, participants used charcoal, sketchpads, and the beauty of Peabody Park to explore texture, shadows, and grayscale. Program participants enjoyed exploring the park, trees, and nature from the perspective of an artist. They used their new knowledge, along with their sketchpads and charcoal to find beauty and draw their surroundings in their everyday lives. Friends' funds purchased art supplies and paid for the honorarium.

Computer Help 1:1 Sessions

Computer Help is an in-person, one-to-one, drop-in and appointment service for up to two hours with library staff or volunteer to assist patrons with general computer and technology use. The goal is to reduce the digital divide and improve digital literacy among communities with limited access and information on how to use technology. Friends funds the position of the library assistant coordinating this service.

Film Screening: Black Panther

The Adult Summer Library Program featured a community film screening of the movie, Black Panther. With a large, blow-up screen in Houdini Plaza and free bags of popcorn, this community event was enjoyed by all ages. Attendees were excited about the availability of the film in a public space in Appleton. Friends' funds were used to cover the film license and popcorn.

Find Your Ancestors: Getting to Know Fold3 Library Edition

The August Find Your Ancestors (FYA) session featured librarian and professional genealogist Debra Dudek, who walked 179 attendees through Fold3 Library Edition, one of the library's genealogy databases. After an overview of how the site works, Debra discussed search strategies that will help users make the most out of using the database and highlighted how to effectively browse the collections to find some of the hidden gems. Many attendees commented they were impressed with the program, with one attendee saying, "I could never find anything on Fold3. Now I feel I can get somewhere with my research." Friends provided financial support for this series and an honorarium for this speaker.

Find Your Ancestors: Introduction to Czech Archives.

The September FYA session focused on Czech ancestors, specifically how to use some of the digital archives available for researchers. Our presenters were leaders from the genealogy group Sokol Milwaukee – Ann Cramer, Susan Chapman and Don Skarda. An overview of all the Czech archives was presented, with a specific focus on how to use three of them to find records like births, marriages and deaths. Attendees enjoyed the step-by-step introduction of the sites and the vast knowledge of the presenters. Friends' provided financial support for this series and an honorarium for this speaker.

FRIENDS GRANTS PROGRAM SUMMARIES

3rd QUARTER 2022

Find Your Ancestors: School Records

In July, the FYA series hosted The Archive Lady, Melissa Barker, to present “The ABC’s and 123’s of Researching Your Ancestor’s School Records.” A total of 183 live attendees tuned in as Melissa walked us through how to find out if school records for your ancestor existed and how to research our ancestors who may not have attended school but may still appear in school records, such as teachers, custodians, laborers, etc. Melissa also discussed some of the common types of school records you may be able to find, provided examples of each type, and discussed how to locate the records. One attendee said, “Melissa Barker was very informative, professional and knew the subject content very well.” Friends’ provided financial support for this series and an honorarium for this speaker.

Learn about Ballet Hispánico

APL partnered with Fox Cities Performing Arts Center (PAC) and Latino Professionals Association (LPA) of Northeast Wisconsin for an in-person viewing of a virtual program with dance company, Ballet Hispánico. Attendees engaged in networking with LPA and learned about the dance company, influences behind their dances, and how their company engages with community across the nation. Friends’ funds paid for a portion of the refreshments for the event and PAC contributed space and additional refreshments.

Nuestras Historias/Our Stories: Latinx Book Discussion

APL continued, “Nuestras Historias/Our Stories” a discussion of Latinx stories. The summer series included a collection of books that highlighted diverse Latinx narratives and experiences. Book titles were selected from offerings in Hoopla to ensure multiple copies of the books are accessible. The discussions are held at a local Mexican treats shop and participants engaged in dialogue and learned how to download e-content from Hoopla. Friends’ funds support refreshments from the small business offering space for the program.

Self-Reflection Meditation with Houa Lor

The first two events of the Adult Summer Library Program explored meditation with presenter Houa Lor. The program was beautifully spoken in Hmong and English. Lor helped participants to understand their identity, self-acceptance, and purpose as they meditated. One individual joined both sessions because they had never participated in a bilingual meditation. They said, “It was beautifully done,” and it improved her stress-related health condition. Friends’ funds provided an honorarium for this presenter.

Tales and Travels

Participants continue to travel the world in the bi-weekly series in partnership with the Fox Valley Memory Project. This quarter, participants explored the history, food, art, and cultures of Arizona, Egypt, and Italy. The second session of each month is hosted by APL’s former Artist-in-Residence, Elyse Krista-Miche, who leads the group in an art project specific to the destination. Friends’ funds are used for program supplies and an honorarium for the artist presenter.

FRIENDS GRANTS PROGRAM SUMMARIES

3rd QUARTER 2022

Teen Classes and Events

End-of-Summer Teen Bash at Pierce Park

The End-of-Summer Teen Bash at Pierce Park welcomed new and returning teens, families and parents to enjoy snacks, games and free books. Staff shared book titles and upcoming programs and signed teens up for the Teen Ambassador Program. Teens had a great time connecting! Friends' funds were used to purchase the refreshments.

Teen Ambassador Program (TAP)

Teen Ambassador Program (TAP) resumed after a summer break. The program welcomed a special guest from Terra Luna join to talk with teens about her role, projects and how students can make an impact. Participants worked on a special assignment pertaining to the new building project, learned about upcoming volunteer opportunities and discussed upcoming programming. Friends' funds were used for refreshments.

Teen Crafting Corner: Crafting with Clay

Teens participated in APL's new drop-in craft program at the Kensington location. They used books from the library's collection as inspiration for their creations. The teens engaged with each other throughout the program and expressed interest in attending upcoming teen programs. Teens and parents were grateful for programs geared towards teens. Staff used program supplies previously purchased with Friends' funds.

Teen Tuesday: DIY T-Shirt Crafting

APL staff kindly donated a variety of t-shirts for upcycling in this DIY t-shirt crafting workshop. Teens repurposed old shirts into bags, scarves and other fun creations with the use of glue, sequins, fabric scissors fabric markers, and a library-crafting book for reference. Friends' provided financial support for this series.

Teen Tuesday: Mindfulness Mysteries w/Christy Sprotte

Teen Tuesday featured a special "Mindfulness Mysteries" program with school psychologist and guest, Christy Sprotte. It was the most well attended Teen Tuesday program of the summer! Teens enjoyed deep breathing exercises, round table discussions, meditation and interactive stations (escape-room style). Friends' provided financial support for this series and an honorarium for this presenter.

Teen Tuesday: Return to Kindergarten

Teens gathered at the Scheig Center to revisit their kindergarten days. Free-play stations were set up with games, puzzles, LEGOs, blocks, Play Doh and coloring. Participants listened to music while they interacted in their preferred areas. They gathered for snacks & story time and ended with songs by staff presenter, Ms. Shanna, and her ukulele! Friends' provided financial support for this series and supplies for this program.

FRIENDS GRANTS PROGRAM SUMMARIES

3rd QUARTER 2022

Teen Tuesday: Solar Printing and Sidewalk Chalk Art

Teen Tuesday blended STEM concepts with art! Teens enjoyed learning about the science of sun art paper. Personal trinkets, flowers and seashells were used for imprinting. The teens also created chalk art. A parent of one of the teens shared how much she enjoyed the variety of teen programming offered. Friends' provided financial support for this series.

Teen Tuesday: Moon Charts & 3D Pen Art

Teens met at the Scheig Center to make NASA 2022 Moon Charts & create cool designs with the library's 3D pens. This program was a huge hit with one teen commenting, "This is the BEST program so far this summer!" OWLS printed Moon Charts on heavy cardstock and helped laminate stencil templates. Friends' provided financial support for this series and supplies for this program.

Children's Classes and Events

Activity Path

Friends' funds were used to purchase additional carpet protection film to create a second activity path in the temporary library space. The activity path has a variety of movements for children (and adults!) to do on their way from the front of the building all the way to the Children's Department at the back of the building. Activities are fall themed for this round.

Graphic Novel Creation Club

Graphic Novels are an intriguing tool and an amazing way for children to find joy through story creation. For three weeks, Karen hosted a Graphic Novel Creation Club. Friends' funds were used to supply the tools needed for participants to draw, color, and create their own graphic novel characters. Attendees learned that they had the power to create their own stories, and are not so hard to create with a little help. Graphic Novels were available for the children to get ideas from and/or to check out and take home.

Pokemon Party

Children's hosted a Pokémon Party in August. Friends funded two balloon twisters from Mischievous and Magic. They were amazing at creating any Pokémon the children requested and they even stayed well beyond the party time to ensure that everyone in their line received a balloon.

Friends' funds also provided us with a plethora of Pokémon supplies. Children and families learned step by step drawing of popular characters, made Pokémon headbands, searched and "caught" Pokémon, made their own Pokeballs, Pokedex's, and Pokémon, traded Pokémon cards, and sat down to get a Pokémon tattoo. While Pokémon has been around for many years, Pokémon continues to delight children and inspire them to come to the library and find Pokémon books to bring home.

FRIENDS GRANTS PROGRAM SUMMARIES

3rd QUARTER 2022

Roaming Ruckus: a True Play Program

Friends' funds were used to purchase new and interesting supplies including pool noodles, pool noodle connectors, interlocking foam mats, a fort building set, clips and clothespins. These additional materials provide the children more opportunities to learn both independently and through interactions with other children at the program. Each program begins with children playing separately, but by the end of the program they have all come together to engage creatively and cooperatively with the materials. These programs continued throughout the summer months meeting twice a month through August.

School Age STEAM – July

The School-Age STEAM program continued for three weeks in July for children in grades K-6. It was held every Thursday in two different sessions. Each week had a unique theme with demonstrations and hands-on activities that highlight science, technology, engineering, art, and/or math. July's themes included learning about lift and drag for planes and helicopters, making Minecraft self-portraits through math, determining what materials sink or float based on their density, and making Elephant Toothpaste. These programs were possible through very generous Friends' funding for supplies.

School Age STEAM – August

The School-Age STEAM program continued for three weeks in August for children in grades K-6. It was held every Thursday in two different sessions. Each week had a unique theme with demonstrations and hands-on activities that highlight science, technology, engineering, art, and/or math. August's themes included Music (to coincide with Mile of Music), Storm the Castle, and Human Body. We had so much fun learning - from the beautiful art of dragon eggs to the smelly, unsightly science of our digestion experiment. These programs were possible through very generous Friends' funding for supplies.

Spanish Storytime

Children's Services utilized Friends' funds to rent the Theater room at the Building for Kids on Tuesday mornings June - August for Spanish Language Storytime. Appleton Ready to Read Funds are also used to subsidize museum visits for participating families. This reboot of the Appleton Ready to Read Program provides families the opportunity to explore the Museum and learn through play after attending storytime and receiving early literacy tips from staff.

Symphony Storytime

Miss Tori was joined by Rachel Richard, a member of the Fox Valley Symphony Orchestra for an all-ages family friendly Storytime at the Appleton Public Library! Miss Tori read *Owl Babies* and *Wow! Said the Owl* while Miss Rachel played many songs on her bassoon, led the children in a dance, and answered questions. Friends' funds were used to provide a stipend for the musician.

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Family Classes and Events

Back to School Bash

Our Back-to-School Bash encouraged teachers, students, and families to get library cards and explore what the library has to offer for the upcoming school year. We partnered with Kiwanis Cops n' Kids to offer free books for attendees as well as a special reading by Police Chief Polly Olson. Attendees also had the opportunity to do fun crafts, attend storytimes with Children's Department staff, try out coding robots, apply tattoos, and more. Craft supplies were purchased new this year with Friends' funds. Robots and tattoos were previously purchased with Friends' funds.

Bubble Bash

In July, the Children's department hosted a Bubble Bash at Memorial Park. 52 children and caregivers attended the program and participated in the bubble fun. We had stations for making your own bubble wand, creating giant bubbles, learning to write bubble letters, painting with bubbles, and even being encapsulated in a human sized bubble! The kids were in awe and had a blast! Friends' funds were used to purchase the supplies for the bubble wand making station, constructing the giant bubble wands and making the bubble solution.

July – September Memorial Park StoryWalk

In partnership with Appleton Parks & Rec, Children's Services utilized Friends' funds to purchase two copies of the following books:

July - *Bear Came Along* by Richard Morris

August - *Muncha, Muncha, Muncha* by Candace Fleming

September - *Little Acorn* by Melanie Joyce

These books were unassembled and then reassembled as StoryWalk pages for the months of July - September. Appleton Parks & Rec built and installed permanent sign holders along a trail at Memorial Park for the StoryWalk pages to be displayed. Families who walk the trail can read the story as they go. These titles are up for 1 month each. In addition to the story itself, each page has fun activities to engage families as they read and walk. Friends' funds provided the books for the Storywalks.

Summer Library Program

The 2022 Summer Library Program ran for nine weeks with 1056 children participating. Friends funded SLP prizes including the final prize of a book and the halfway prize of a bag and pop-it for children 3-12 or bag and bath toy for toddlers. Children LOVED choosing a book of their very own to keep as a reward for their summer reading challenge. Friends also funded SLP stickers which are used both as giveaways and as marketing throughout the community.

Programs for All Ages

Hispanic Heritage Month Celebration

APL celebrated National Hispanic Heritage Month with a special event at the Kensington location. Craft activities for children and teens included DIY bracelets and Mexican mirror art. Participants tried sweet treats, Puerto Rican pastries and champurrado. Lawrence University students performed Mariachi music live for participants. Friends' funds were used for the musicians' honorarium and the refreshments.

Latino Fest

APL hosted an outreach table at Latino Fest, Casa Hispana's annual celebration of Latinx/Hispanic culture and community. APL was one of over 30 community organizations sharing information and resources. Participants learned about the library and took photos with an oversized library card to recognize National Library Card Sign-Up Month. Friends' funds were used to pay the nonprofit booth fee.

Rhythms of the World

APL hosted an outreach table at Rhythms of the World, an annual community event that brings together the Fox Cities to celebrate music and dance from cultures around the world. APL staff also served on the planning committee. Participants learned about library cards, services, programs, and a collaborative initiative called Community Powered. Friends' funds provided sponsorship for the event, which included the outreach table.

Ongoing Classes, Events and Services

Adult Summer Library Program

The Adult Summer Library Program's goal every year is to keep the experience simple, fun, and rewarding for all participants. Adults set their own reading goal each week and earn badges on the Beanstack app. Each badge earned an entry into a weekly book drawing. Adult SLP participants appreciated the free books. Friends' funds were used to purchase the program incentives.

FlipSide

APL's online local music streaming collection, accepted new music submissions this summer. Two community members were recruited to the FlipSide curators team to select submissions and promote FlipSide to musicians and music lovers. Library staff attended music and community events to share FlipSide with musicians and the community at large. Friends' funds were used to purchase outreach supplies for library staff use.

Teen Summer Library Program

The Teen Summer Library Program encouraged teens to read for two hours per week and log their progress in the Beanstack app throughout the summer. APL presented

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each of the 78 teens who registered for the program with their choice of a free book to get them started on their reading. Of the teen readers who successfully finished the Beanstack reading challenge, three teens were randomly selected and awarded grand prizes. Friends' funds were used to purchase the grand prizes.

Animoto – Video Making Subscription

Children's used Friends' funds to extend APL's annual Animoto subscription until July 2023. Animoto is a video making website. Children's use it for video promotion and programming. All library departments have access to the service and encouraged to use it as needed.

Special Projects

Back to School Bash: Teen Activities

APL hosted "Back to School Bash," a special event to celebrate the beginning of the school year at the Kensington location. Children's Services and Teen Services staff offered a variety of activities and hosted partner organizations, Empowered Tutoring and Terra Luna. Teens engaged in button making and 3D pen art, learned about fall programming, and signed up for Teen Ambassador Program. Friends' funds were used to purchase program supplies.

Building Project Communications

Friends' funds paid for outside printing of various building project communications.

Constant Contact

Friends' funds pay for our mass email service provider. We use this service to email our subscribers information about library news, classes, services and more.

Community Partnerships – Library Assistant Position:

This Friends funded, part time non-benefitted position has increased capacity for community engagement and outreach related to individual and community well-being. The staff member has increased capacity related to computer help service relationships with volunteers, community partners, community initiatives, agency overview learning sessions for library staff, community partner outreach at the library, library programs, and outreach to promote well-being resources.

Early Childhood Toys

Friends' funds were used to purchase some new vehicle toys and magnetic shapes for the early childhood play area. The vehicle toys are one of the main attractions in the play area and provide countless hours of enjoyment for our youngest patrons. The new additions include a carrier airplane, flat bed truck and race car, a truck pulling a camper and boat trailer, and replacement cars for the two car carrier trucks. We added the magnetic shapes to one of the metal endcaps for children to create their own designs or follow one of the laminated pattern pictures. We have received many compliments from children and caregivers about these additions and they are constantly in use.

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Teen Outreach Supplies

Teen Services staff ordered APL-branded items for teen outreach events, lip balms and highlighters. Staff have found that sharing branded items are a fun and useful way to connect with teens and help make interactions memorable. Friends' funds were used to purchase the outreach items.