



## AGENDA CITY COUNCIL MEETING

January 20, 2026 - 6:00 PM  
City Hall Council Chambers

Members of the public can participate in person at Lakeville City Hall, 20195 Holyoke Avenue. Members of the public may join the meeting via [Teams Meeting](#), Meeting ID: 231 766 620 158; Passcode: Ht2zz2yf or by calling Toll Number 1-323-433-2142; Conference ID:681 819 109 #. The mayor will allow for public comments and questions at the appropriate time.

The City Council is provided background information for agenda items in advance by staff and appointed commissions, committees, and boards. Decisions are based on this information, as well as City policy, practices, input from constituents, and a council member's personal judgment.

1. Call to order, moment of silence and flag pledge
2. Roll Call
3. Citizen Comments
4. Additional agenda information
5. Presentations/Introductions
  - a. 2025 Annual Liquor Operations Report
6. Consent Agenda
  - a. Check Register Summary
  - b. Minutes of the 01/05/2025 City Council Meeting
  - c. Agreement with ECSI to upgrade Access Control at the Police Station
  - d. Resolution Accepting Wellness Grant Funding
  - e. Joint Powers Agreement with Vermillion River Watershed Joint Powers Organization and Dakota County for Watershed Management Improvements at Jaguar Pond and Outlot D, Airlake 70 First Addition
  - f. Agreement Between OptumHealth Care Solutions, LLC and the City of Lakeville for the Fitness Passport Program
  - g. Encroachment Agreement with TCLD LF3 Ritter for Private Improvements in Public Easements
  - h. Agreement with RES PYRO for July 4th Fireworks Display
  - i. Approve Plans and Specifications and Set a Bid Date For the 214th Street Reconstruction Project
  - j. Purchase Agreement from EMI Audio for Grand Prairie Park Grandstand Audio System Equipment and Installation

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- k. Professional Services Agreement for a Compensation Study
  - l. Professional Services Agreement for Kenrick Aveune Wall Repairs and Area Drainage Improvements
  - m. Agreements with Xcel Energy for Streetlight Replacement
  - n. North Ryan Second Addition
  - o. 2026 Community Development Block Grant Application
  - p. Approval of Pay Equity Filing
7. Action Items
8. Unfinished Business
9. New Business
10. Announcements
- a. Next City Council Work Session Monday, January 26, 2026
  - b. Next City Council Meeting Monday, February 2, 2026
11. Adjourn



Date: 1/20/2026

### Check Register Summary

#### Proposed Action

Staff recommends adoption of the following motion: Move to approve the Check Register Summary.

#### Overview

Checks	328356 - 328570	\$6,183,067.63
ACH/EFT	23868 - 24175	\$2,697,202.61
Total		\$8,880,270.24

The City Council receives a list of expenditures paid (claims detail), which is available to the public upon request. The City serves as the fiscal agent for Lakeville Arenas and Dakota 911 and processes their accounts payable and payments – these amounts are not included in the total above.

#### Supporting Information

1. 01.02.26 and 01.13.26 CKSUM-ACH-EFT
2. 01.02.26 and 01.13.26 CKSUM-Checks
3. Check Register 01.02.26 and 01.13.26 for January 20, 2026 Council Mtg - Checks
4. Check Register 01.02.26 and 01.13.26 for January 20, 2026 Council Mtg - ACH-EFT

**Financial Impact:** \$8,880,270.24    **Budgeted:** Yes    **Source:** Various  
**Envision Lakeville Community Values:** Good Value for Public Service  
**Report Completed by:** Cheri Donovan, Assistant Finance Director

## CHECK DISBURSEMENT REPORT FOR CITY OF LAKEVILLE

	Amount
1000 GENERAL FUND	763,539.43
2000 COMMUNICATIONS FUND	19,359.75
3116 2014B REFUNDING BONDS	120.00
3119 2017A HRA LEASE REV LIQ REF BO	120.00
3120 2022A REFUNDING BONDS	60.00
3121 2022B GO TAXABLE BONDS HASSE	60.00
3122 2022C BONDS (PARK REF)	60.00
3123 2023A PARK REFERENDUM BONDS	60.00
3124 2024A TAX BONDS (PARK REF)	60.00
3125 2025A FIRST CENTER	60.00
3251 2021A APEX ENERGY SAVINGS	120.00
3252 2021B KEOKUK LIQUOR STORE	120.00
3253 2022B TAXABLE GO REF BONDS 16A	60.00
3315 2011A IMPROVE BONDS	120.00
3318 2014A IMPROVEMENT BONDS	120.00
3319 2015A IMPROVEMENT BONDS	120.00
3320 2016B IMP BONDS (15-02,16-02, 16-04)	120.00
3321 2017A IMPROVEMENT BONDS	120.00
3322 2018A IMPRV BONDS	120.00
3323 2019A IMPRV BONDS	120.00
3324 2020A IMPRV BONDS	120.00
3325 2022C IMPRV BONDS	60.00
3326 2022A IMPRV BONDS	55.00
3327 2024A IMPRV BONDS	55.00
3328 2025A IMPRV BONDS	55.00
3538 2018B ST RECON & REF BOND (09A)	120.00
3539 2021C STREET RECONSTR BONDS	120.00
3541 2023A STREET RECON BONDS	55.00
3702 2016A WATER REVENUE BONDS	120.00
4000 BUILDING FUND	42,558.16
4100 EQUIPMENT FUND	6,219.36
4125 TECHNOLOGY FUND	1,454.35
4200 PARK DEDICATION FUND	320,966.68
4401 TRAIL IMPROVEMENT FUND	1,121.50
4500 PARK IMPROVEMENT FUND	12,541.14
4720 2024A PARK BONDS	2,022.02
5200 STATE AID CONSTRUCTION FUND	1,059.00
5300 PAVEMENT MANAGEMENT FUND	34,072.75
5500 WATER TRUNK FUND	6,897.50
5600 SANITARY SEWER TRUNK FUND	2,574.50
6589 22-24 AIRLAKE 70 IMPROVEMENT	51,186.91
6595 24-02 STREET RECONSTRUCTION	1,830.75
6597 2025 STREET PROJECTS	2,419.15
6611 2026 STREET PROJECTS	26,881.00
7450 ENVIRONMENTAL RESOURCES FUND	111,527.10
7575 STREET LIGHTING FUND	29.61
7600 WATER FUND	24,551.63
7700 SEWER FUND	4,316.08
7800 LIQUOR FUND	608,396.25
8000 ESCROW FUND	616.35
8970 LAKEVILLE ARENAS - OPERATIONS	11.00
9800 PAYROLL CLEARING FUND	648,550.64
Report Total:	2,697,202.61

## CHECK DISBURSEMENT REPORT FOR CITY OF LAKEVILLE

	<b>Amount</b>
1000 GENERAL FUND	364,807.39
2000 COMMUNICATIONS FUND	1,297.44
3125 2025A FIRST CENTER	1,628.40
4000 BUILDING FUND	1,827,541.76
4100 EQUIPMENT FUND	54,577.71
4125 TECHNOLOGY FUND	33,307.00
4500 PARK IMPROVEMENT FUND	9,712.00
4720 2024A PARK BONDS	222,108.15
5200 STATE AID CONSTRUCTION FUND	435.11
7450 ENVIRONMENTAL RESOURCES FUND	30,545.79
7575 STREET LIGHTING FUND	16,215.37
7600 WATER FUND	73,294.90
7700 SEWER FUND	513,346.62
7800 LIQUOR FUND	245,132.92
7900 MUNICIPAL RESERVES FUND	11,906.11
8000 ESCROW FUND	2,571,051.01
9800 PAYROLL CLEARING FUND	206,159.95
Report Total:	6,183,067.63



## MINUTES CITY COUNCIL MEETING

January 5, 2026 - 6:00 PM  
City Hall Council Chambers

### 1. **Call to order, moment of silence and flag pledge**

Mayor Hellier called the meeting to order at 6:00 P.M.

### 2. **Roll Call**

Members Present: Mayor Hellier, Council Members Bermel, Lee, Volk, Wolter

Staff Present: Justin Miller, City Administrator; Andrea McDowell Poehler, City Attorney; Joe Masiarchin, Parks & Recreation Director; Allyn Kuennen, Assistant City Administrator; Ann Orlofsky, City Clerk; Brad Paulson, Police Chief; Paul Oehme, Public Works Director; Tina Goodroad, Community Development Director

### 3. **Citizen Comments**

Alesha Schaupp, 20537 Idalia Avenue, requested termination of the Flock Safety agreement.

Jacob Borealis, 20618 Kaftan Court, expressed concerns regarding cybersecurity and cloud data storage associated with the Flock Safety system and requested rescission of the agreement and a cybersecurity audit.

Dane Schneemann, 16851 Javelin Avenue, expressed concerns regarding the risks of the Flock Safety system and requested termination of the agreement.

### 4. **Additional agenda information**

None

### 5. **Presentations/Introductions**

#### a. **Public Works Quarterly Report**

Public Works Director Paul Oehme presented the Public Works Quarterly Report.

### 6. **Consent Agenda**

Motion was made by Volk, seconded by Wolter, to approve the following:

Voice vote was taken on the motion. Ayes - Hellier, Bermel, Lee, Volk, Wolter

- a. Check Register Summary
- b. Minutes of the 12/15/2025 City Council Meeting
- c. Minutes of the 12/08/2025 City Council Work Session

- d. Supplemental Agreement with Stonebrooke Engineering for Professional Services for 215th Street and Utility Improvements from Kenrick Avenue to CSAH 70
- e. Designation of Legal Newspaper for 2026
- f. Radio Advertising Agreement for the Lakeville Area Arts Center with MyTalk 107.1
- g. Contract for Orchard Lake Stormwater Outlet Improvement
- h. Contract for 2026 Water Treatment Plant Chemicals
- i. Approval of Local Affordable Housing Aid Agreement
- j. Resolution Supporting Dakota County's Application for Funding Through the Better Utilizing Investments to Leverage Development Grant Program for the Dakota County Mobility and Safety Improvements: Interstate 35 and County State Aid Highway 5/50 Interchange and Bridge Reconstruction Project
- k. Resolution Appointing Depositories for the City of Lakeville
- l. Resolution Delegating Authority to Pay Claims and Make Electronic Fund Transfers
- m. Heritage Commons 10<sup>th</sup> Addition Final Plat
- n. Release of Development Contract and Conditional Use Permit for Lord of Life Townhomes
- o. Veridian Credit Union Conditional Use Permit
- p. SMNPT 1, LLC Conditional Use Permit
- q. Putrah Shores Preliminary and Final Plat
- r. Flagship Recreation Proposal for the Purchase and Installation of Playground Equipment for the Lakeville Area Arts Center
- s. SRF Consulting Amendment Number Two Proposal for Professional Services for Grand Prairie Park
- t. Facility Use Agreement Between the Lakeville Yellow Ribbon and City of Lakeville

## 7. Action Items

### a. Ordinance Amending Title 11 of the City Code and Summary Ordinance for Publication Related to Auto Repair Businesses

Community Development Director Tina Goodroad presented the staff report. The Community Development Department recommended approval of an ordinance amending Title 11 (Zoning Ordinance), Chapter 86 (I-1 Light Industrial District), to allow greater flexibility for the location of fenced outdoor storage areas associated with major automobile repair uses. The Planning Commission held a public hearing on December 18, 2026, received no public comment, and unanimously recommended approval.

Motion was made by Wolter, seconded by Bermel, to approve an ordinance amending Title 11 of the City Code and a summary ordinance for publication.

Roll call was taken on the motion. Ayes - Hellier, Bermel, Lee, Volk, Wolter

### b. Caliber Collision Conditional Use Permit

Joan Firnhaber requested approval of a conditional use permit to allow a major

automobile repair use in the I-1, Light Industrial District, located in the Great Outdoor Room building at 9583 217th Street, near the southwest corner of 215th Street (CSAH 70) and Dodd Boulevard (CSAH 9). The proposal includes a fenced outdoor storage area at the rear of the building.

Community Development Director Tina Goodroad presented the staff report. The Planning Commission held a public hearing on December 18, 2025, following proper notice, and unanimously recommended approval. No public comment was received. The conditional use permit includes conditions related to hours of operation, outdoor storage, fire and environmental compliance, and required Minnesota Pollution Control Agency permits.

Motion was made by Bermel, seconded by Volk, to approve a conditional use permit to allow a major automobile repair use and adopt the findings of fact.  
Roll call was taken on the motion. Ayes - Hellier, Bermel, Lee, Volk, Wolter

**c. Appointment of the Acting Mayor for 2026**

Motion was made by Wolter, seconded by Volk, to appoint John Bermel as the Acting Mayor for 2026.

Roll call was taken on the motion. Ayes - Hellier, Bermel, Lee, Volk, Wolter

**8. Unfinished Business**

None

**9. New Business**

None

**10. Announcements**

**a. Next City Council Retreat Saturday, January 17, 2026**

**b. Next City Council Meeting January, 20, 2026**

**11. Adjourn**

Motion was made by Lee, seconded by Volk, to adjourn at 6:30 P.M.

Voice vote was taken on the motion. Ayes - Hellier, Bermel, Lee, Volk, Wolter

Respectfully Submitted,

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Ann Orlofsky, City Clerk

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Luke M. Hellier, Mayor



**Date:** 1/20/2026

## **Agreement with ECSI to upgrade Access Control at the Police Station**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve agreement with ECSI to upgrade the access control system at the Police Station

### **Overview**

Following our standard budget and lifecycle evaluations, we plan hardware upgrades to meet the City's security, compatibility, and capability needs. As part of our multi-year plan to replace the outdated access control system and integrate card access with our camera systems, we are continuing the transition to Genetec.

This phase will:

- Upgrade our aging backend system to allow for newer, more secure credentials
- Upgrade the card readers at the doors to allow for those credentials
- Add the Police Station to the same system that will soon be used by the FiRST Center.

Staff recommends the approval of the full project, totaling \$87,840.

### **Supporting Information**

1. Lakeville Police Dept Genetec Access Control Proposal

<p><b>Financial Impact:</b> \$87,840    <b>Budgeted:</b> Yes    <b>Source:</b> Technology Fund <b>Envision Lakeville Community Values:</b> Safety Throughout the Community <b>Report Completed by:</b> Trevor Stewart, IT Manager</p>
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7900 Chicago Avenue S  
Bloomington, MN 55420  
651-735-7470

December 30, 2025

Mr. Trevor Stewert

RE: Lakeville Genetec Conversion

For your consideration, ECSI is pleased to provide you with this proposal for the work associated with the above referenced project. This proposal is inclusive of all material and labor as to ensure a complete installation in accordance with the scope listed below.

**Access Control**

**Police Station**

ECSI will include all the following equipment and labor associated:

- (3) Genetec 16 Reader Cabinets
- (1) Genetec 1502 Board
- (21) Genetec 52 Boards
- (44) Card Reader SSA
- (39) Card Readers
- (2) Keypad Readers
- Mortis Lock Assembly
- Cabling To New Door
- Demo of Existing System
- Installation and Programming Setup

<b>Total Building Amount:</b>	<b>\$87,840.00</b>
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**Clarifications & Exclusions**

- Work to be performed during normal business hours.
- AC power (if needed) to be provided by others.

**Warranty:** All equipment provided by ECSI is warranted (Parts and Labor) for 1 year.

**Terms:** Our proposal is valid for 60 days.

Thank you for the opportunity to provide you with this quotation. If you should have any questions or require further information, please contact me at your convenience.

Sincerely,

Matt Heise, ECSI  
Business Development  
Cell – 612-209-6362

Approved By: \_\_\_\_\_

Date: \_\_\_\_\_



**Date:** 1/20/2026

## **Resolution Accepting Wellness Grant Funding**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve the resolution accepting grant funding to the City of Lakeville from Southeast Service Cooperative 2025 Wellness Funding Program.

### **Overview**

The City of Lakeville continues to be dedicated to helping employees create and maintain a healthy lifestyle. The Lakeville Envision Wellness committee applied and received a grant through Southeast Service Cooperative for 2025. The funds will be used to financially help support wellness initiatives that were offered by the committee.

For 2025 the committee offered employees a healthy community supported agriculture initiative and opportunities to participate in educational seminars.

### **Supporting Information**

1. Wellness Grant Resolution

<p><b>Financial Impact:</b> \$3500    <b>Budgeted:</b> Yes    <b>Source:</b> <b>Envision Lakeville Community Values:</b> Good Value for Public Service <b>Report Completed by:</b> Alissa Frey, Human Resources Director</p>
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**CITY OF LAKEVILLE**

**RESOLUTION NO. \_\_\_\_**

**Resolution Accepting Grant from Southeast Service Cooperative 2025 Wellness Funding**

**WHEREAS**, the City of Lakeville supports the grant application process of Southeast Service Cooperative 2025 Wellness Funding Program is being awarded \$3,500 for the City’s Envision Wellness Program; and

**WHEREAS**, Minnesota Statute 465.03 requires that all gifts and donations of real or personal property be accepted only with the adoption of a resolution of the governing body.

**NOW, THEREFORE, BE IT RESOLVED** by the City Council of the City of Lakeville, Minnesota, that the grant awarded from Southeast Service Cooperative 2025 Wellness Funding Program is hereby officially accepted; and

**BE IT FURTHER RESOLVED** that the City of Lakeville sincerely thanks Southeast Service Cooperative for the 2025 wellness funding.

**ADOPTED** by the Lakeville City Council this 20<sup>th</sup> day of January 2026.

CITY OF LAKEVILLE

\_\_\_\_\_  
Luke M. Hellier, Mayor

ATTEST:

\_\_\_\_\_  
Ann Orlofsky, City Clerk



Date: 1/20/2026

**Joint Powers Agreement with Vermillion River Watershed Joint Powers Organization and Dakota County for Watershed Management Improvements at Jaguar Pond and Outlot D, Airlake 70 First Addition**

**Proposed Action**

Staff recommends adoption of the following motion: Move to approve Joint Powers Agreements with the Vermillion River Watershed Joint Powers Organization and Dakota County for a) Stormwater Management Improvements at Jaguar Pond, City Project 24-49, and b) Wetland Restoration and Maintenance within Outlot D, Airlake 70 First Addition, City Project 24-60.

**Overview**

The City, Dakota County, and Vermillion River Watershed Joint Powers Organization (VRWJPO) are partnering on capital improvement projects designed to improve stormwater management at Jaguar Pond (CP 24-49) and within Outlot D, Airlake 70 First Addition (CP 24-60). City Project 24-49 is designed to improve stormwater management functionality and includes excavation, draintile/filter maintenance, and slope stabilization. City Project 24-60 is designed to restore wetland habitat and includes vegetation maintenance. The projects advance City natural resources initiatives and contribute toward reduced pollutant loading to Lake Marion (CP 24-49) and South Creek (designated trout stream tributary to the Vermillion River, CP 24-60) and meeting Minnesota Pollution Control Agency pollution reduction requirements.

The Joint Powers Agreements establish City, County and VRWJPO project responsibilities and cost participation. The City is the lead agency for the projects. Therefore, total project costs are reflected in this memo. The total estimated project cost for CP 24-49 is \$108,009; the City's estimated cost is \$36,003. The balance of the cost will be paid by the County (\$36,003) and VRWJPO (\$36,003). The total estimated project cost for CP 24-60 is \$155,152; the City's estimated cost is \$40,076. The balance of the cost will be paid by the County (\$75,000) and VRWJPO (\$40,076).

**Supporting Information**

1. Joint Powers Agreement (Dakota County Contract No. DCA23676)
2. Joint Powers Agreement (Dakota County Contract No. DCA23335)

**Financial Impact:** \$263,161    **Budgeted:** Yes    **Source:** Multiple Sources  
**Envision Lakeville Community Values:** Access to a Multitude of Natural Amenities and Recreational Opportunities  
**Report Completed by:** Maria Friedges, Environmental Resources Specialist



**JOINT POWERS AGREEMENT BETWEEN THE VERMILLION RIVER WATERSHED  
JOINT POWERS ORGANIZATION, THE CITY OF LAKEVILLE, AND DAKOTA COUNTY  
FOR LAKE MARION PHOSPHOROUS TREATMENT PROJECT/DAKOTA COUNTY 50-19/  
JAGUAR POND IMPROVEMENTS PROJECT, CITY PROJECT 24-49**

**WHEREAS**, Minn. Stat. § 471.59 authorizes local governmental units to jointly or cooperatively exercise any power common to the contracting parties; and

**WHEREAS**, the Vermillion River Watershed Joint Powers Organization is a watershed management body consisting of Dakota and Scott Counties (VRWJPO) governed by the Vermillion River Watershed Joint Powers Board (VRWJPB) and is charged with carrying out the duties set forth in Minn. Stat. § 103B.211 to 103B.255 and as otherwise provided by law; and

**WHEREAS**, the City of Lakeville (City) is a governmental and political subdivision of the State of Minnesota; and

**WHEREAS**, Dakota County (County) is a governmental and political subdivision of the State of Minnesota, and

**WHEREAS**, the VRWJPO identified Lake Marion as a water resource requiring protection from further degradation of water quality resulting from phosphorus and sediment-laden stormwater runoff; and

**WHEREAS**, Jaguar Pond, formerly known as Jaguar Avenue Stormwater Basin, is located in Lakeville and accepts drainage from upstream areas and drains to Lake Marion within the Vermillion River Watershed; and

**WHEREAS**, the VRWJPO, County and City partnered in the initial construction of Jaguar Pond in 2018 as part of Dakota County 50-19 project; and

**WHEREAS**, continuous groundwater seepage and base flow created conditions and storage capacity reduction, combined with large storm events, resulting in the failure of Jaguar Pond; and

**WHEREAS**, all applicable warranties regarding the initial construction of Jaguar Pond have expired; and

**WHEREAS**, the City has entered into a contract with an engineering consultant to provide a final design of improvements determined by the engineering consultant to be necessary to improve the functionality of the Lake Marion Phosphorus Treatment Project/Dakota County 50-19 Project/Jaguar Pond (City Project 24-49 (Project)), contract documents including plans and specifications (Project Plans), and construction administration for the Project at a cost of \$17,400.00 (Engineering Cost); and

**WHEREAS**, the City has awarded a contract for the construction of the Project at a total cost of \$90,609.00 (Project Cost); and

**WHEREAS**, construction of the Project is will commence in 2025; and

**WHEREAS**, the VRWJPO, County and City are partnering to share in the Engineering Cost and Project Cost of the Project as set forth herein; and

**WHEREAS**, the City has agreed to provide up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 towards the Project Cost and has funding available in their budget to participate in the costs; and

**WHEREAS**, the County has agreed to provide up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 towards the Project Cost and has funding available in their budget to participate in the costs; and

**WHEREAS**, the VRWJPO has agreed to provide up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 towards the Project Cost and has funding available in their budget to participate in the costs.

**NOW, THEREFORE**, in consideration of the mutual promise and benefits that the VRWJPO, County and City shall derive from this Agreement, the VRWJPO, County, and City hereby enter into this Agreement for the purposes stated herein.

**ARTICLE 1  
PURPOSE**

This Agreement defines the Project responsibilities and Project cost-sharing obligations of the VRWJPO, City, and County.

**ARTICLE 2  
PARTIES**

The parties to this Agreement are the VRWJPO, City, and County.

**ARTICLE 3  
TERM**

This Agreement is effective upon the date of the signatures of the parties to this Agreement and shall remain in effect until December 31, 2026, or until completion by the parties of their respective obligations under this Agreement, whichever occurs first, unless earlier terminated by law or according to the provisions of this Agreement.

**ARTICLE 4  
COOPERATION**

The VRWJPO, City, and County agree to cooperate and use their reasonable efforts to ensure prompt implementation of the various provisions of this Agreement and to, in good faith, undertake resolution of any dispute in an equitable and timely manner.

**ARTICLE 5  
TECHNICAL AND QUALITY ASSURANCE**

Any engineer providing technical or quality assurance for the Project must be a licensed Professional Engineer in the State of Minnesota. The Project will be designed using appropriate practice standards for design, construction, operation, and maintenance. The engineer(s) providing technical and quality assurance will certify that the Project was installed or constructed consistent with the Project Plans, including approved modifications, prior to authorization for payment by the VRWJPO or County. The City shall have an as-built plan set provided to the VRWJPO and County by the engineer(s) immediately following Project completion as part of the required Project certification.

**ARTICLE 6  
PROJECT PLANS AND SPECIFICATIONS**

The City is the lead agency for design and construction administration of the Project, effective upon execution of this Agreement by all parties. The VRWJPO, City, and County shall approve the plans and specifications (Project Plans) prior to the City advertising for bids.

**ARTICLE 7  
PAYMENT**

**7.1** The City shall administer the contract(s) for the Project and act as the paying agent for all payments to the contractor(s).

**7.2** The parties shall make the following contributions toward the Engineering Cost and Project Cost in accordance with the following payment schedule in consideration of the benefit provided by the Project constructed in accordance with the Project Plans.

7.2.1 The County, by and through its Transportation Department, shall contribute up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 toward the Project Cost.

7.2.2 The City shall contribute up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 towards the Project Cost.

7.2.3 The VRWJPO shall contribute up to \$5,800.00 towards the Engineering Cost and up to \$30,203.00 towards the Project Cost.

**7.3** The City's maximum eligible reimbursement is up to \$72,006.00 when accounting for cash contributions of both the VRWJPO and County.

**7.4** No payment by the parties shall be made prior to approval of the Project Plans by the VRWJPO, City, and County.

**7.5** The VRWJPO and County may refuse to pay claims not specifically authorized by this Agreement. Payment of a claim shall not preclude the VRWJPO and/or County from questioning the propriety of the claim. The VRWJPO and County reserve the right to be repaid for any overpayment or disallowed claim.

**7.6** Subject to Article 12, the VRWJPO and County shall pay the City their share of the Project Cost upon receipt of the Project certification pursuant to Article 5 up to the maximum amounts identified in Sections 7.2.1 and 7.2.3. The City shall invoice the County and VRWJPO for their share of Engineering Cost along with such documentation required by either the County or VRWJPO to verify the City's payment to the engineer. The City shall invoice the County and VRWJPO for their share of Project Cost once the Project certification is provided to the parties. The VRWJPO and County shall make payment to the City within thirty-five (35) days of receipt of an invoice from the City provided the invoice shall be supported by itemized Project receipts and invoices from the City's engineer(s) and contractor(s).

## **ARTICLE 8 CITY OBLIGATIONS**

**8.1 AUTHORIZED PURPOSE.** The funds provided under the terms of this Agreement may only be used by the City for the payment of costs directly related to the Project.

**8.2 CONSTRUCTION REQUIREMENTS.** The Project shall be constructed according to the Project Plans. The VRWJPO, City, and County shall approve any modifications to the Project Plans.

**8.3 CONSTRUCTION AND DESIGN FAILURES.** Any failure related to construction or design of the Project shall be addressed in the City's contracts with the construction firm and professional services firm.

**8.4 RIGHT-OF-ENTRY.** The City hereby permits the VRWJPO and County, its employees, duly authorized representatives and agents to enter upon and have rights of ingress and egress over and access at reasonable times to the real property where the Project will be located to inspect the construction of the Project. Notwithstanding the right to inspect, neither the VRWJPO nor County is obligated hereunder to inspect the work performed on the Project.

**8.5 OPERATION AND MAINTENANCE.** The City shall be responsible for on-going maintenance of the Project or will request shared responsibility with the County and VRWJPO for on-going maintenance of

the Project upon completion and shall follow the terms described in the Joint Powers Agreement for the Dakota County 50-19 project (VRW Resolution 17-11) unless a failure occurs from an Act of God or Force Majeure occurs such that it is cost prohibitive to repair or maintain.

**8.6 COMPLIANCE WITH LAWS/STANDARDS.** The City shall abide by all federal, state, or local laws, statutes, ordinances, rules, and regulations in constructing the Project, including obtaining all necessary permits to construct the Project.

**8.7 PUBLICITY.** The City hereby permits the VRWJPO and County to take and disclose photographs of the Project for use in publications or promotional material or on their websites to highlight the VRWJPO's programs. The City, County, and VRWJPO shall appropriately acknowledge the funding provided by the VRWJPO, County, and City in any promotional materials, signage, reports, publications, notices, and presentations related to the Project. This section shall survive the expiration or termination of this Agreement.

## **ARTICLE 9 INDEMNIFICATION**

Each party to this Agreement shall be liable for the acts of its officers, employees or agents and the results thereof to the extent authorized by law and shall not be responsible for the acts of the other parties, or officers, employees or agents or the other parties. The provisions of the Municipal Tort Claims Act, Minn. Stat. Ch. 466 and other applicable laws govern liability of the VRWJPO, City, and the County. Each party warrants that it can comply with the aforementioned indemnity requirements through an insurance or self-insurance program and that each has minimum coverage consistent with liability limits contained in Minn. Stat. Ch. 466. In the event of any claims or actions filed against any party, nothing in this Agreement shall be construed to allow a claimant to obtain separate judgments or separate liability caps from the individual parties. This section shall survive the expiration or termination of this Agreement.

## **ARTICLE 10 AUTHORIZED REPRESENTATIVES AND LIAISONS**

**10.1 AUTHORIZED REPRESENTATIVES.** The following named persons are designated the authorized representatives of the parties for this Agreement. These persons have authority to bind the party they represent and to consent to modifications, except that the authorized representative shall have only the authority specifically or generally granted by their respective governing boards. Notice required to be provided pursuant to this Agreement shall be made to the following named persons and addresses unless otherwise stated in this Agreement, or an amendment of this Agreement:

TO THE VRWJPO: Tom Wolf or successor, Chair  
Vermillion River Watershed Joint Powers Organization  
4100 220<sup>th</sup> Street W., Ste #103, Farmington, MN, 55024  
Telephone: (612) 229-5855  
[twolf@co.scott.mn.us](mailto:twolf@co.scott.mn.us)

TO THE CITY: Justin Miller or successor, City Administrator  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville, MN 55044  
Telephone: (952) 985-4400  
[jmiller@lakevillemn.gov](mailto:jmiller@lakevillemn.gov)

TO THE COUNTY: Georg T. Fischer, Director  
Physical Development Division  
14955 Galaxie Avenue

Apple Valley, MN 55124  
Telephone: (952) 891-7007  
[georg.fischer@co.dakota.mn.us](mailto:georg.fischer@co.dakota.mn.us)

In addition, regarding termination of this Agreement by the shall be provided to the Office of the Dakota County Attorney, Civil Division, 1560 Highway 55, Hastings, MN 55033.

**10.2 LIAISONS.** To assist the parties in the day-to-day performance of this Agreement and to ensure compliance and provide ongoing consultation, a liaison shall be designated by the VRWJPO, City, and the County. The VRWJPO, City, and the County shall keep each other continually informed, in writing, of any change in the designated liaison. At the time of execution of this Agreement, the following persons are the designated liaisons:

VRWJPO Liaison:	Jeff Dunn Water Resources Engineer Telephone: (952) 891-7546 Email: <a href="mailto:jeff.dunn@co.dakota.mn.us">jeff.dunn@co.dakota.mn.us</a>
City Liaison:	McKenzie Cafferty Environmental Resources Manager Telephone: (952) 985-4520 Email: <a href="mailto:mcafferty@lakevillemn.gov">mcafferty@lakevillemn.gov</a>
County Liaison	Todd Howard Assistant County Engineer Telephone: (952) 891-7906 Email: <a href="mailto:todd.howard@co.dakota.mn.us">todd.howard@co.dakota.mn.us</a>

## ARTICLE 11 MODIFICATIONS

Any alterations, variations, modifications, or waivers of the provisions of this Agreement shall only be valid when they have been reduced to writing, approved by the parties' respective Boards, or as delegated by the parties' respective Boards, and signed by the Authorized Representatives, or delegated authority, of the VRWJPO, City, and County.

## ARTICLE 12 TERMINATION

**12.1 IN GENERAL.** Any party may terminate this Agreement for cause by giving seven days' written notice of its intent to terminate, to the other parties. Such notice to terminate for cause shall specify the circumstances warranting termination of the Agreement. Cause shall mean a material breach of this Agreement and any supplemental agreements or amendments thereto. This Agreement may also be terminated by the City or County in the event of a default by the VRWJPO. Notice of Termination shall be made by certified mail or personal delivery to the authorized representative of the other parties. Termination of this Agreement shall not discharge any liability, responsibility or right of any party, which arises from the performance of or failure to adequately perform the terms of this Agreement prior to the effective date of termination.

**12.2 TERMINATION BY VRWJPO OR COUNTY FOR LACK OF FUNDING.** Notwithstanding any provision of this Agreement to the contrary, either the VRWJPO or the County may immediately terminate this Agreement if it does not obtain funding from the Minnesota Legislature, Minnesota Agencies, or other funding sources, or if it's funding cannot be continued at a level sufficient to allow payment of the amounts due under this Agreement. Neither the VRWJPO nor the County is obligated to pay for any services that are provided after written notice of termination for lack of funding. The party terminating under this provision for lack of funding will pay for expenses incurred by the other parties hereto up to Notice of Termination for work on the Project.

**ARTICLE 13  
MINNESOTA LAW TO GOVERN**

This Agreement shall be governed by and construed under the substantive and procedural laws of the State of Minnesota, without giving effect to the principles of conflict of laws. All proceedings related to this Agreement shall be venued in the County of Dakota, State of Minnesota. This section shall survive the expiration or termination of this Agreement.

**ARTICLE 14  
MERGER**

This Agreement is the final expression of the agreement of the parties and the complete and exclusive statement of the terms agreed upon and shall supersede all prior negotiations, understandings, or agreements.

**ARTICLE 15  
SEVERABILITY**

The provisions of this Agreement shall be deemed severable. If any part of this Agreement is rendered void, invalid, or unenforceable, such rendering shall not affect the validity and enforceability of the remainder of this Agreement unless the part or parts that are void, invalid or otherwise unenforceable shall substantially impair the value of the entire Agreement with respect to any party.

**ARTICLE 16  
GOVERNMENT DATA PRACTICES**

The City, County, and the VRWJPO must comply with the Minnesota Government Data Practices Act, Minn. Stat. Ch. 13, as it applies to all data provided, created, collected, received, stored, used, maintained, or disseminated under this Agreement. The civil remedies of Minn. Stat. § 13.08 apply to the release of the data referred to in this clause by either the City, County, or the VRWJPO.

**ARTICLE 17  
SURVIVABILITY**

The provisions of articles 8.3 (Construction and Design Failures), 8.5 (Operation and Maintenance), 9 (Indemnification) and 16 (Government Data Practices) survive the expiration or termination of this Agreement.

**ARTICLE 18  
DEFAULT: FORCE MAJEURE**

No party shall be liable to the other parties for any loss or damage resulting from a delay or failure to perform due to unforeseeable acts or events outside the defaulting party's reasonable control, providing the defaulting party gives notice to the other parties as soon as possible. Acts and events may include acts of God, acts of terrorism, war fire, flood epidemic, pandemic, acts of civil or military authority, and natural disasters.

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement on the date(s) indicated below.

**CITY OF LAKEVILLE**

By \_\_\_\_\_  
Luke M. Hellier, Mayor  
Date of Signature: \_\_\_\_\_

By \_\_\_\_\_  
Ann Orlofsky, City Clerk  
Date of Signature: \_\_\_\_\_

**VERMILLION RIVER WATERSHED  
JOINT POWERS ORGANIZATION**

By \_\_\_\_\_  
Tom Wolf or successor, Chair  
Date of Signature: \_\_\_\_\_

VRW Res. No.25-45

**DAKOTA COUNTY**

By \_\_\_\_\_  
Georg T. Fischer, Director  
Physical Development Division  
Date of Signature: \_\_\_\_\_

Dakota County Board Res. No.

**JOINT POWERS AGREEMENT  
BETWEEN THE VERMILLION RIVER WATERSHED JOINT POWERS ORGANIZATION,  
THE COUNTY OF DAKOTA AND THE CITY OF LAKEVILLE  
FOR THE LAUNCH PARK WETLAND RESTORATION PROJECT CONSTRUCTION AND  
MAINTENANCE**

**WHEREAS**, Minn. Stat. § 471.59 authorizes local governmental units to jointly or cooperatively exercise any power common to the contracting parties; and

**WHEREAS**, the Vermillion River Watershed Joint Powers Organization is a watershed management body consisting of Dakota and Scott Counties (VRWJPO) governed by the Vermillion River Watershed Joint Powers Board (VRWJPB) and is charged with carrying out the duties set forth in Minn. Stat. § 103B.211 to 103B.255 and as otherwise provided by law; and

**WHEREAS**, the County of Dakota (County) is a governmental and political subdivision of the State of Minnesota; and

**WHEREAS**, the City of Lakeville (City) is a governmental and political subdivision of the State of Minnesota; and

**WHEREAS**, South Creek (AUID 07040001-517) is located within the Vermillion River Watershed and Dakota County and is included in the EPA's 303d Impaired Waters List for Total Suspended Solids (TSS); and

**WHEREAS**, the Vermillion River Watershed Restoration and Protection Strategy (WRAPS) Report includes the implementation of sediment reduction and/or volume reduction Best Management Practices within publicly owned lands in the South Creek subwatershed to reduce TSS loading in the Vermillion River; and

**WHEREAS**, the VRWJPO's Vermillion River Watershed Management Plan includes working with partners to restore wetlands through revegetation for flood protection and pollutant filtration; and

**WHEREAS**, the City acquired Outlot D, Airlake 70 First Addition (Parcel), previously in agricultural production, which drains to South Creek; and

**WHEREAS**, prior to implementation of sediment reduction and/or volume reduction practices within the Parcel, a wetland restoration design and applicable permitting through State agencies must be completed; and

**WHEREAS**, the City entered into a contract with an engineering consultant (Engineer) to provide a wetland restoration and volume reduction design to reduce TSS loading in the Vermillion River, including construction plans and specifications (Project Plans), and obtain applicable permitting necessary for the Project (City Project 24-60); and

**WHEREAS**, the VRWJPO, County, and City entered into an Joint Powers Agreement (JPA) to cooperatively fund the wetland restoration and volume reduction design and permitting on October 15, 2024; and

**WHEREAS**, the wetland restoration and volume reduction Project Plans and permitting is now complete and on-site construction and restoration (Project) is ready to commence; and

**WHEREAS**, the Engineer administered a Request for Quotes for the Project and the lowest bid amount was \$105,152 (Project Cost); and

**WHEREAS**, vegetation maintenance (Project Maintenance) is critical in the five years immediately following the Project (2026 through 2030)(Maintenance Period); and

**WHEREAS**, the City shall provide the Project Maintenance during the Maintenance Period and beyond; and

**WHEREAS**, the VRWJPO shall contribute towards the cost of the Project Maintenance performed during the Maintenance Period (Project Maintenance Cost); and

**WHEREAS**, the VRWJPO, County, and City have agreed to cooperatively participate in the Project and Project Maintenance and have funding available in their respective budgets to jointly participate in the Project Cost and/or Project Maintenance Cost to the extent identified herein.

**NOW, THEREFORE**, in consideration of the mutual promises and benefits that the VRWJPO, County, and City shall derive from this Agreement, the VRWJPO, County, and City hereby enter into this Agreement for the purposes stated herein.

#### **ARTICLE 1 PURPOSE**

This Agreement defines the Project and Project Maintenance responsibilities and cost-sharing obligations of the VRWJPO, County, and City.

#### **ARTICLE 2 PARTIES**

The parties to this Agreement are the VRWJPO, County, and City.

#### **ARTICLE 3 TERM**

This Agreement is effective upon the date of the signatures of the parties to this Agreement and shall remain in effect until December 31, 2030, or until completion by the parties of their respective obligations under this Agreement, whichever occurs first, unless earlier terminated by law or according to the provisions of this Agreement.

#### **ARTICLE 4 COOPERATION**

The VRWJPO, County, and City agree to cooperate and use their reasonable efforts to ensure prompt implementation of the various provisions of this Agreement and to, in good faith, undertake resolution of any dispute in an equitable and timely manner.

#### **ARTICLE 5 ON-SITE WETLAND RESTORATION AND VOLUME REDUCTION**

The City is the lead agency for administration of the Project, effective upon execution of this Agreement by all parties. The VRWJPO, County, and City shall inspect and approve wetland restoration and volume reduction activities occurring on the Parcel.

#### **ARTICLE 6 POST PROJECT VEGETATION MAINTENANCE**

The City is the lead agency for administration of the Project Maintenance, effective upon execution of this Agreement by all parties. The VRWJPO, County, and City shall inspect and approve Project Maintenance activities occurring on the Parcel.

## **ARTICLE 7 PAYMENT**

**6.1** The parties shall make the following contributions toward the Project Cost in accordance with the following payment schedule in consideration of the benefit provided by restoration activities on the Parcel in accordance with the Project Plans. The City will administer the Engineer and contractor contracts for the Project and act as the paying agent for all payments to the Engineer and contractor.

**6.1.1** The County, by and through its Environmental Resources Department, shall contribute \$75,000 toward the Project Cost.

**6.1.2** The City shall contribute \$15,076 toward the Project Cost.

**6.1.3** The VRWJPO shall contribute \$15,076 toward the Project Cost.

**6.1.4** The VRWJPO shall contribute up to \$5,000 annually on a matching basis towards the Project Maintenance Cost during the Maintenance Period (2026 through 2030).

**6.1.5** The County is not contributing monetarily to the Project Maintenance Cost.

**6.2** The City's maximum total eligible reimbursement is \$115,076 when accounting for the VRWJPO and County contributions.

**6.3** No payment shall be made prior to approval of the Project by the VRWJPO, County, and City, and execution of this Agreement.

**6.4** The VRWJPO and County shall pay the City their share of the Project Cost and Project Maintenance Cost on a reimbursement basis up to the maximum amounts identified in Sections 6.1.1 through 6.2. The City shall invoice the County and VRWJPO for their share of Project Cost once construction is complete to the satisfaction of all Parties. The City shall invoice the VRWJPO for its matching share of the Project Maintenance Cost up to the maximum annual contribution identified in Section 6.1.4 once vegetation maintenance activities are completed in each respective year during the Maintenance Period (2026 through 2030). The VRWJPO and County shall make payment to the City within thirty-five (35) days of receipt of an invoice from the City provided the invoice shall be supported by itemized Project and Project Maintenance receipts and invoices from the City's contracted Engineer and contractor.

**6.5** The VRWJPO and County may refuse to pay an invoice for services or fees not specifically authorized by this Agreement. Payment of an invoice shall not preclude the VRWJPO and County from questioning the propriety of the claimed services or fees. The VRWJPO and County reserve the right to be repaid for any overpayment or disallowed claimed services or fees.

## **ARTICLE 8 OBLIGATIONS**

**8.1 AUTHORIZED PURPOSE.** The funds provided under the terms of this Agreement may only be used by the City for the payment of costs directly related to the Project.

**8.2 CONTENT REQUIREMENTS.** The Project and Project Maintenance shall be carried out according to the objectives outlined in the City's contract with its Engineer and/or contractor. The VRWJPO, County, and City shall approve any modifications to the scope of the Project and Project Maintenance.

**8.3 COMPLIANCE WITH LAWS/STANDARDS.** The City shall abide by all federal, state, or local laws, statutes, ordinances, rules, and regulations in executing the Project.

**ARTICLE 9  
INDEMNIFICATION**

Each party to this Agreement shall be liable for the acts of its officers, employees or agents and the results thereof to the extent authorized by law and shall not be responsible for the acts of the other parties, or officers, employees or agents or the other parties. The City agrees to defend, indemnify, and hold harmless the County and VRWJPO against any and all claims, liability, loss, damage, or expense arising under the provisions of this Agreement for which the City is responsible, including negligent acts or omissions of the City and/or those of City employees or agents. All Parties to this Agreement recognize that liability for any claims arising under this Agreement are subject to the provisions of the Minnesota Municipal Tort Claims Law; Minnesota Statutes, Chapter 466. The City warrants that it can comply with the aforementioned indemnity requirements through an insurance or self-insurance program and that it has minimum coverage consistent with liability limits contained in Minn. Stat. Ch. 466. In the event of any claims or actions filed against any party, nothing in this Agreement shall be construed to allow a claimant to obtain separate judgments or separate liability caps from the individual parties. This section shall survive the expiration or termination of this Agreement.

**ARTICLE 10  
AUTHORIZED REPRESENTATIVES AND LIAISONS**

**10.1 AUTHORIZED REPRESENTATIVES.** The following named persons are designated the authorized representatives of the parties for this Agreement. These persons have authority to bind the party they represent and to consent to modifications, except that the authorized representative shall have only the authority specifically or generally granted by their respective governing boards. Notice required to be provided pursuant to this Agreement shall be made to the following named persons and addresses unless otherwise stated in this Agreement, or an amendment of this Agreement:

TO THE VRWJPO: Tom Wolf or successor, Chair  
Vermillion River Watershed Joint Powers Organization  
4100 220<sup>th</sup> St. W #103  
Farmington, MN 55024  
Telephone: (612) 229-5855  
[twolf@co.scott.mn.us](mailto:twolf@co.scott.mn.us)

TO THE COUNTY: Georg Fischer, Director, or successor  
Physical Development  
14955 Galaxie Avenue  
Apple Valley, MN 55124  
Telephone: (952-237-6089  
[georg.fischer@co.dakota.mn.us](mailto:georg.fischer@co.dakota.mn.us)

TO THE CITY: Justin Miller, City Administrator, or successor  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville, MN 55044  
Telephone: (952) 985-4400  
[jmiller@lakevillemn.gov](mailto:jmiller@lakevillemn.gov)

In addition, notification to the VRWJPO and County regarding termination of this Agreement by the City shall be provided to the Office of the Dakota County Attorney, Civil Division, 1560 Highway 55, Hastings, MN 55033.

**10.2 LIAISONS.** To assist the parties in the day-to-day performance of this Agreement and to ensure compliance and provide ongoing consultation, a liaison shall be designated by the VRWJPO, County and City. The VRWJPO, County, and City shall keep each other continually informed, in writing, of any change in the designated liaison. At the time of execution of this Agreement, the following persons are the designated liaisons:

VRWJPO Liaison: Kelly Perrine  
Senior Watershed Specialist  
Telephone: (952) 891-7002  
Email: [kelly.perrine@co.dakota.mn.us](mailto:kelly.perrine@co.dakota.mn.us)

County Liaison: Cole Johnson  
Water Resources Project Supervisor  
Telephone: (952) 891-7539  
Email: [cole.johnson@co.dakota.mn.us](mailto:cole.johnson@co.dakota.mn.us)

City Liaison: McKenzie Cafferty  
Environmental Resources Manager  
Telephone: (952) 985-4520  
Email: [mcafferty@lakeville.mn.gov](mailto:mcafferty@lakeville.mn.gov)

#### **ARTICLE 11 MODIFICATIONS**

Any alterations, variations, modifications, or waivers of the provisions of this Agreement shall only be valid when they have been reduced to writing, approved by the parties' respective Boards, or as delegated by the parties' respective Boards, and signed by the Authorized Representatives, or delegated authority, of the VRWJPO, County, and City.

#### **ARTICLE 12 TERMINATION**

**12.1 IN GENERAL.** Any party may terminate this Agreement for cause by giving seven days' written notice or without cause by giving 30 days' written notice of its intent to terminate, to the other parties. Such notice to terminate for cause shall specify the circumstances warranting termination of the Agreement. Cause shall mean a material breach of this Agreement and any supplemental agreements or amendments thereto. This Agreement may also be terminated by any of the parties in the event of a default by one party. Notice of Termination shall be made by certified mail or personal delivery to the authorized representative of the other parties. Termination of this Agreement shall not discharge any liability, responsibility or right of any party, which arises from the performance of or failure to adequately perform the terms of this Agreement prior to the effective date of termination.

**12.2 TERMINATION FOR LACK OF FUNDING.** Notwithstanding any provision of this Agreement to the contrary, the VRWJPO, County, or City may immediately terminate this Agreement if it does not obtain funding from the Minnesota Legislature, Minnesota Agencies, or other funding sources, or if its funding cannot be continued at a level sufficient to allow payment of the amounts due under this Agreement. The terminating body shall remain obligated to pay for any invoices received prior to any parties' receipt of written notice of termination for lack of funding. The remaining parties shall determine by majority vote whether to continue this Agreement upon receipt of termination pursuant to this Section 11.2.

#### **ARTICLE 13 MINNESOTA LAW TO GOVERN**

This Agreement shall be governed by and construed under the substantive and procedural laws of the State of Minnesota, without giving effect to the principles of conflict of laws. All proceedings related to this

Agreement shall be venued in the County of Dakota, State of Minnesota. This section shall survive the expiration or termination of this Agreement.

**ARTICLE 14  
MERGER**

This Agreement is the final expression of the agreement of the parties and the complete and exclusive statement of the terms agreed upon and shall supersede all prior negotiations, understandings, or agreements.

**ARTICLE 15  
SEVERABILITY**

The provisions of this Agreement shall be deemed severable. If any part of this Agreement is rendered void, invalid, or unenforceable, such rendering shall not affect the validity and enforceability of the remainder of this Agreement unless the part or parts that are void, invalid or otherwise unenforceable shall substantially impair the value of the entire Agreement with respect to any party.

**ARTICLE 16  
GOVERNMENT DATA PRACTICES**

The Parties must comply with the Minnesota Government Data Practices Act, Minn. Stat. Ch. 13, as it applies to all data provided, created, collected, received, stored, used, maintained, or disseminated under this Agreement. The civil remedies of Minn. Stat. § 13.08 apply to the release of the data referred to in this clause by either the VRWJPO, County or City.

**ARTICLE 17  
SURVIVABILITY**

The provisions of Article 8 (Indemnification) and Article 15 (Government Data Practices) survive the expiration or termination of this Agreement.

**ARTICLE 18  
DEFAULT: FORCE MAJEURE**

No party shall be liable to the other parties for any loss or damage resulting from a delay or failure to perform due to unforeseeable acts or events outside the defaulting party's reasonable control, providing the defaulting party gives notice to the other parties as soon as possible. Acts and events may include acts of God, acts of terrorism, war fire, flood epidemic, pandemic, acts of civil or military authority, and natural disasters.

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement on the date(s) indicated below.

**VERMILLION RIVER WATERSHED  
JOINT POWERS ORGANIZATION**

**DAKOTA COUNTY**

By: \_\_\_\_\_  
Tom Wolf or successor, Chair

By: \_\_\_\_\_  
Georg Fischer or successor, Director

Date of Signature: \_\_\_\_\_

Date of Signature: \_\_\_\_\_

VRW Res. No. 25-45

County Res. No. 25-503

**CITY OF LAKEVILLE**

By: \_\_\_\_\_  
Luke M. Hellier or successor, Mayor

Date of Signature: \_\_\_\_\_

By: \_\_\_\_\_  
Ann Orlofsky, City Clerk

Date of Signature: \_\_\_\_\_



**Date:** 1/20/2026

**Agreement Between OptumHealth Care Solutions, LLC and the City of Lakeville for the Fitness Passport Program**

**Proposed Action**

Staff recommends adoption of the following motion: Agreement between OptumHealth Care Solutions, LLC. and City of Lakeville for the Fitness Passport Program

**Overview**

Optum Health Care Solutions, LLC has been reimbursing the Heritage Center for members participating in the Fitness Passport Program. This agreement sets out the terms of the monthly reimbursements. The agreement will be reviewed and renewed annually.

**Supporting Information**

1. OptumHealth Agreement for the Fitness Passport Program

<p><b>Financial Impact:</b> \$NA    <b>Budgeted:</b> No    <b>Source:</b> <b>Envision Lakeville Community Values:</b> A Sense of Community and Belonging <b>Report Completed by:</b> Susan Johnson, Recreation Manager</p>
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Amendment to the Agreement Between OptumHealth Care Solutions, LLC  
and City of Lakeville

This Amendment ("Amendment") dated January 1, 2026 (the "Amendment Effective Date") is entered into by and between OptumHealth Care Solutions, LLC, including its affiliates, with its principal place of business at 1 Optum Circle, Eden Prairie, MN 55344 ("Optum"); and City of Lakeville, including its Participating Facilities, with its principal place of business at 20110 Holyoke Ave, Lakeville, MN 55044 ("Network," together with Optum, the "Parties").

Whereas, Optum and Network entered the Fitness Passport Service Agreement dated , as amended (the "Agreement") for the provision of certain services by Optum to Network; and

Whereas, the Parties desire to amend certain terms and conditions of the Agreement in accordance with this Amendment and agree to new terms and conditions as set forth herein.

Now, therefore, the Parties mutually agree as follows:

1. Capitalized terms used herein which are not otherwise defined in this Amendment or any attachments hereto shall have the meaning assigned to them in the Agreement.

2. Article 2 Section 2.1 of the Agreement shall be deleted in its entirety and replaced amended as follows:

2.1 Term. The initial term of this Agreement shall begin on the Effective Date and shall continue through December 31, 2027 ("Initial Term"). Thereafter, this Agreement shall automatically renew on the same terms and conditions on January 1<sup>st</sup> of each calendar year after the Initial Term for successive twelve (12) month terms (each a "Renewal Term"), unless otherwise agreed to in writing prior to September 1<sup>st</sup> of each calendar year or otherwise terminated in accordance with Section 2.2 of this Agreement. The Initial Term and each subsequent Renewal Term may be referred to collectively or separately as "Term".

3. Article 2 Section 2.2 of the Agreement shall be deleted in its entirety and replaced amended as follows:

2.2 Termination. This Agreement may be terminated by any of the following:

- a) If either party provides written notice of non-renewal for the next Renewal Term prior to September 1<sup>st</sup> of the current Term. Following proper notice of non-renewal the current Term will effectively terminate as of midnight local time of Network on December 31; or
- b) By either Party upon mutual written agreement; or
- c) If either Party breaches any material provision of this Agreement and fails to cure such breach within thirty (30) days after written notice is given by the non-breaching Party, the Agreement shall terminate at the end of the thirty (30) day period. Any failure to use good faith efforts to cure the breach will be considered an early termination under section (d) below.
- d) Network may terminate the Agreement prior to the end of the Term at the end of any calendar month and agrees to pay Optum an early termination fee that is due on the early termination date, pursuant to the Early Termination Fee section that follows. Should Network fail to remit timely payment in full as of the early termination date, Network shall pay Optum interest at the rate of one and half percent (1.5%) or the maximum permitted by law, whichever is less, for each thirty (30) day period on a prorated basis that Network has not remitted the full balance due to Optum. Further, Network shall be liable for any collection/legal/court fees Optum incurs to collect such fee and interest.

**Early Termination Fee.** For each month of the Term remaining after the early termination date, Network shall pay Optum a lump sum early termination fee equal to fifty percent (50%) of the average Network Reimbursement Fees that Optum paid Network during the current Term (e.g., If Optum average fees for January – May (5 months) equaled \$2,000.00/month, Network would pay Optum an early termination fee of \$7,000.00 ((2,000.00 x 50% = \$1,000.00) x 7 months remaining in the Term = \$7,000.00).

- e) This Agreement shall terminate immediately and automatically upon delivery to the other Party of written notice of termination on the occurrence of one of the following:
  - I. Bankruptcy, insolvency or the dissolution of either Party;
  - II. Unauthorized assignment of this Agreement, whereby such assignment will be subject to the early termination fee in (d) above of this Agreement; or
  - III. The loss of any license, qualification, authorization, accreditation or certification required for a Party to perform its duties under this Agreement that was not the result of such Party’s willful or negligent act or omission (which such act or omission will be subject to the early termination fee in section (d) above.
- f) Each Party agrees to notify the other Party in writing not later than five (5) business days after the occurrence of any of the events referred to immediately above.

4. Section II of Appendix A Fees and Descriptions of Services is deleted and replaced in its entirety with the following:

**II. Network Reimbursement Fees:** In connection with participating in the Fitness Passport Program, Optum will reimburse Network a pre-determined amount each calendar month for each participating Member, following Network’s validation and representation that the Member has met the program criteria as defined by Optum below. The Network Facility Reimbursement payment is based on a Member’s cumulative number of monthly visits to any Network Participating Facility. For the avoidance of doubt, only one Network Facility Reimbursement payment shall be made for each participating Member per month, regardless of the number of Network Participating Facilities that the participating Member visited.

Member Participation Requirement	Network Reimbursement amount paid by Optum
Member visits any Participating Facility during calendar month.	\$ 20.00 per visit to Participating Facility with a maximum monthly payment of \$ 20.00 (1 visits)

Unless Network has notified Optum in writing no later than August 1st of the current Term the Network Reimbursement Fee will not be negotiable and will continue for the next Renewal Term.

1. **Most Favored Reimbursement.** Network represents and warrants that the Network Facility Reimbursement as outlined in this Agreement is equal to or lower than the reimbursement per-visit rates and maximum monthly fees being offered by Network to any other customer for the same or similar services. If during the term of this Agreement Network enters into an agreement or arrangements with any other customer contracting with Network for the benefit of its members which includes lower reimbursement per-visit rates or maximum monthly fees for the same or similar services as stated in this Agreement, Network shall promptly identify such lower per-visit rates and/or maximum monthly fees to Optum, and the Parties shall execute an amendment to this Agreement to incorporate the change in Network Facility Reimbursement effective as of the date that the Network made such lower rates available to such customer.

5. Section III 1. Network Responsibilities. of Appendix A shall be amended to include the following new subsection h.
  - h. Between August 15th and September 1st of each calendar year, Network shall report to Optum by email to the following email address fitnessnetwork@optum.com whether or not Network has executed a contract for the next calendar year with any other customer for the same or similar services.
6. Entire Agreement. This Amendment and the Agreement constitute the entire agreement and understanding of the parties hereto and supersede all prior agreements, consents, and understandings relating to the subject matter hereof whether oral or in writing. The parties agree that there are no other oral or other agreements between the parties that have not been incorporated into this Amendment and the Agreement.
7. Each of the persons signing this Amendment represents and warrants that he/she is a duly authorized officer, director or agent of the party on whose behalf the person is signing, and further represents and warrants that the person signing has the power and authority to bind the party, and that the party has the legal power to enter into this Amendment.

**CITY OF LAKEVILLE**

**OPTUMHEALTH CARE SOLUTIONS, LLC.**

\_\_\_\_\_

Luke Hellier, Mayor

By \_\_\_\_\_

\_\_\_\_\_ [print name]

Its \_\_\_\_\_ [title]

\_\_\_\_\_

Ann Orlofsky, City Clerk



**Date:** 1/20/2026

**Encroachment Agreement with TCLD LF3 Ritter  
for Private Improvements in Public Easements**

**Proposed Action**

Staff recommends adoption of the following motion: Move to approve Encroachment Agreement with TCLD LF3 Ritter, LLC for private improvements in public easements.

**Overview**

TCLD LF3 Ritter, LLC (Twin Cities Land Development) requests approval for an existing privately-owned and maintained retaining wall in public easements. The property owner will own and maintain the retaining wall and is responsible for removing the private improvements if the City determines the public easements must be utilized.

**Supporting Information**

1. Encroachment Agreement

<p><b>Financial Impact:</b> \$0    <b>Budgeted:</b> No    <b>Source:</b> N/A <b>Envision Lakeville Community Values:</b> Design that Connects the Community <b>Report Completed by:</b> Jonathan Nelson, Assistant City Engineer</p>
--

*(reserved for recording information)*

---

## **ENCROACHMENT AGREEMENT**

**AGREEMENT** made this \_\_\_\_ day of \_\_\_\_\_, 2025, by and between the **CITY OF LAKEVILLE**, a Minnesota municipal corporation (“City”), and **TCLD LF3 RITTER, LLC**, a Minnesota limited liability company (“Owner”).

**1. BACKGROUND.** Owner is the fee owner of certain real property located in the City of Lakeville, County of Dakota, State of Minnesota, legally described as follows:

Lot 56, Block 1, Ritter Meadows Second Addition, Dakota County, Minnesota, according to the recorded plat thereof.

(“Subject Property”)

The City owns easements for drainage and utility purposes over portions of the Subject Property (“Easement Areas”). The Owner constructed a retaining wall on the Subject Property which encroaches on the City’s Easement Areas as legally described and depicted on Exhibit “A”.

**2. ENCROACHMENT AUTHORIZATION.** The City hereby approves the encroachment in the City’s Easement Areas on the Subject Property for the retaining wall subject to the conditions set forth in this Agreement. Further conditions of encroachment approval are:

- The City shall have no responsibility to maintain or repair the retaining wall located within the City's Easement Areas.
- The retaining wall located on the Subject Property must not impact or increase water drainage on the abutting properties or cause any adverse drainage patterns or erosion to the abutting properties.
- The Owner shall construct the retaining wall consistent with all applicable federal, state and local laws and regulations.
- The Owner, its, successors and assigns, are fully responsible and liable for any and all damage caused to the retaining wall because of it being constructed in the City's Easement Areas.
- The Owner of the Subject Property will own and maintain the retaining wall.

3. **HOLD HARMLESS AND INDEMNITY.** In consideration of being allowed to encroach in the City's Easement Areas, the Owner, for itself, its heirs, successors and assigns, hereby agrees to indemnify and hold the City harmless from any damage caused to the Subject Property or retaining wall encroaching into the City's Easement Areas as depicted on Exhibit "A", including the retaining wall in the City's Easement Areas, caused in whole or in part by the encroachment into the City's Easement Areas.

4. **TERMINATION OF AGREEMENT.** The City may terminate this Agreement at any time if it is reasonably necessary for the City to occupy the City's Easement Areas for drainage or utility purposes and the retaining wall is inconsistent with the City's use of the easement. Prior to termination, the City will give the then owner of the Subject Property thirty (30) days advance written notice, except that no notice period will be required in the case of an emergency condition as determined solely by the City and this Agreement may then be terminated immediately. The property owner shall remove that portion of the retaining wall to the extent it impacts the City's Easement Areas to the effective date of the termination of this Agreement. If the property owner fails to do so, the City may remove the retaining wall to the extent it impacts the City's Easement areas and charge the cost of removal back to the property owner for reimbursement.

5. **RECORDING.** This Agreement shall run with the land and shall be recorded against the title to the Subject Property.

**CITY OF LAKEVILLE**

(SEAL)

By: \_\_\_\_\_  
Luke M. Hellier, Mayor

And \_\_\_\_\_  
Ann Orlofsky, City Clerk

STATE OF MINNESOTA     )  
  )ss.  
COUNTY OF DAKOTA     )

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 2025, by Luke M. Hellier and Ann Orlofsky, respectively the Mayor and City Clerk of the City of Lakeville, a Minnesota municipal corporation, on behalf of the corporation and pursuant to the authority granted by its City Council.

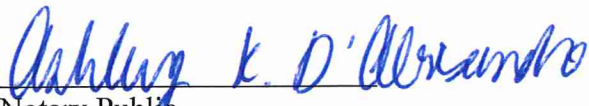
\_\_\_\_\_  
Notary Public

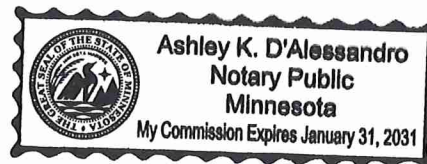
**PROPERTY OWNER:**  
**TCLD LF3 RITTER, LLC**  
a Minnesota limited liability company

By:   
Benjamin Schmidt  
Its: President

STATE OF MINNESOTA )  
 )ss.  
COUNTY OF HENNEPIN )

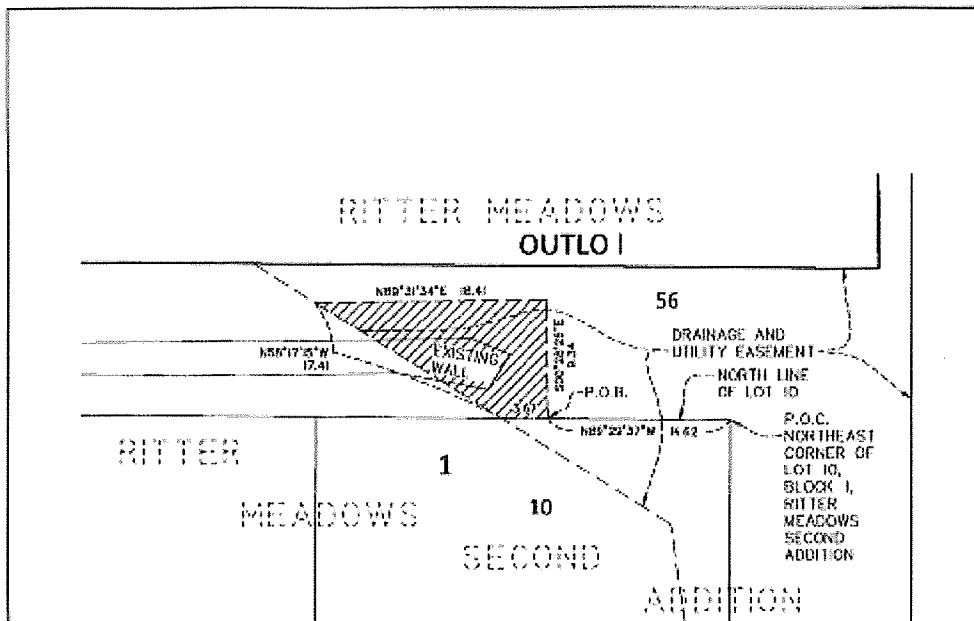
The foregoing instrument was acknowledged before me this 5<sup>th</sup> day of January, 2025, by Benjamin Schmidt, the President of **TCLD LF3 RITTER, LLC**, a Minnesota limited liability company, on behalf of said entity.

  
Notary Public



THIS INSTRUMENT WAS DRAFTED BY:  
**CAMPBELL KNUTSON**  
*Professional Association*  
Grand Oak Office Center I  
860 Blue Gentian Road, Suite 290  
Eagan, Minnesota 55121  
Telephone: (651) 452-5000  
AMP/smt

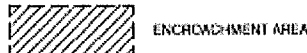
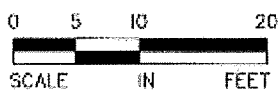
# EXHIBIT "A"



**Well Encroachment Area Description**

That part of Lot 10, Block 1, RITTER MEADOWS SECOND ADDITION, according to the recorded plat thereof, Dakota County, Minnesota, described as follows:

Commencing at the northeast corner of Lot 10, Block 1, said plat of RITTER MEADOWS SECOND ADDITION; thence North 89 degrees 28 minutes 37 seconds West, assumed bearing along the north line of said Lot 10, a distance of 14.62 feet to the point of beginning; thence continuing North 89 degrees 29 minutes 37 seconds West 3.67 feet to the drainage and utility easement per said plat; thence North 58 degrees 17 minutes 15 seconds West along said drainage and utility easement, 17.41 feet; thence North 89 degrees 31 minutes 34 seconds East 18.41 feet; thence South 00 degrees 28 minutes 29 seconds East 8.34 feet to the point of beginning.



<table border="1"> <tr> <td>Geographic</td> <td>202012</td> <td>Checked By</td> <td>06</td> </tr> <tr> <td>Drawn By</td> <td>WML/202012</td> <td>Traced By</td> <td>07</td> </tr> <tr> <td>Date</td> <td>2/10/2020</td> <td>Scale</td> <td>1" = 10'</td> </tr> </table>	Geographic	202012	Checked By	06	Drawn By	WML/202012	Traced By	07	Date	2/10/2020	Scale	1" = 10'	<p><b>RITTER MEADOWS 2ND ADDITION</b> WALL ENCROACHMENT EXHIBIT LAKEVILLE, MINNESOTA</p>	<p>Allard Engineering, Inc. 733 Marquette Ave., Ste. 730 Minneapolis, MN 55402 612.753.2000 WWW 612.753.2000 FAX WWW.Allard-Eng.com</p>
Geographic	202012	Checked By	06											
Drawn By	WML/202012	Traced By	07											
Date	2/10/2020	Scale	1" = 10'											



**Date:** 1/20/2026

## **Agreement with RES PYRO for July 4th Fireworks Display**

### **Proposed Action**

Staff recommends adoption of the following motion:

### **Overview**

This year's celebration will begin with pre-fireworks festivities at Century Middle School, and the July 4th fireworks display will be launched from King Park. The pre-fireworks festivities include food trucks, a petting zoo, and more. The City budgeted \$32,000 for the fireworks display as part of the Lakeville Liquor Fund and the Lakeville Lions will be donating \$8,000 to this year's display.

In 2020, the city assumed responsibility for executing the agreement for the fireworks display. The 2022 RFP sent to vendors included an option to renew the agreement for five years (through 2027), pending approval of appropriate funding and an excellent rating for each show. RES PYRO has a long history of great shows here in Lakeville, including 2025. The attached agreement has been reviewed by the City Attorney and staff is recommending approval of the agreement by the Mayor and City Council.

### **Supporting Information**

1. RES Pyro Agreement for 2026 Fireworks Display

<p><b>Financial Impact:</b> \$40,000    <b>Budgeted:</b> Yes    <b>Source:</b> Liquor Fund and Donations <b>Envision Lakeville Community Values:</b> Envision Lakeville Community Values: Access to a Multitude of Natural Amenities and Recreational Opportunities <b>Report Completed by:</b> Susan Johnson, Recreation Manager</p>
---



**DISPLAY CONTRACT AGREEMENT**

**THIS AGREEMENT**, made and entered into on this 12th day of January, 2026 between **RES Pyro**, hereafter referred to as the SELLER and **City of Lakeville**, hereafter referred to as the BUYER.

**IT IS MUTUALLY AGREED BETWEEN THE SELLER AND THE BUYER AS FOLLOWS:**

Service Provided	Outdoor Fireworks Display
Date(s)	Saturday, July 4, 2026
Rain Date	Sunday, July 5 <sup>th</sup> , 2026
Time	Dusk (Approximately)
Duration	20-21 minutes (depending on intensity)
Location	King Park, Lakeville, MN
Event Sponsor	City of Lakeville

**OBLIGATIONS OF SELLER:**

SELLER shall provide all materials, equipment, and personnel necessary to perform the above-mentioned display.

SELLER is required and will comply with NFPA 1123, Code for Outdoor Display of Fireworks, 2018 edition and NFPA 1126, Pyrotechnics before a Proximate Audience, 2016 edition.

SELLER shall provide a certificate of liability insurance in the amount of \$5,000,000.00 to cover the fireworks display and cleanup. BUYER shall be listed as Certificate Holder on the Certificate of Liability insurance. All individuals/entities listed on the certificate of liability insurance will be deemed an additional insured per this contract.

SELLER will assist with cleanup of debris in the display site area.

SELLER shall include the BUYER, as co-insured on Certificate of Insurance.

SELLER shall comply with all applicable federal, state, and local laws, ordinances, rules and regulations.

SELLER shall carry the following insurance coverage:

A. Workers' compensation and employer's liability insurance in amounts sufficient pursuant to the laws of the State of Minnesota.

B. Commercial general liability insurance with combined single limits of liability not less than \$5,000,000 for bodily injury, including personal injury or death, products liability, and property damage.

The BUYER shall be named as additional insured on all such insurance policies, with the exception of workers' compensation coverage. The contractor shall provide a certificate of liability insurance, and a copy of additional insured endorsement by June 21, 2026, evidencing such coverage and, at BUYER'S request, furnish BUYER with copies of insurance policies and with evidence of payment of premium or fees of such policies.

**OBLIGATIONS OF BUYER:**

BUYER shall provide a suitable location for firing of the fireworks display.

BUYER shall provide and cover all costs for security, safety, and cleanup at the display site.

## **TERMS AND CONDITIONS:**

The terms of this agreement shall begin on the day of the signing of this agreement and shall conclude upon the completion of the display. However, if before the date of the scheduled performance, the BUYER has not performed fully its obligations under the terms of this agreement or that the financial credit of the BUYER has been impaired, the SELLER may cancel this agreement at any time.

In the event the BUYER does not perform fully all of its obligations herein, the SELLER shall have the option to perform or refuse to perform hereunder, and in either event the BUYER shall be liable to the SELLER for any damages, compensation or costs incurred including but not limited to attorney and court fees in addition to the compensation herein.

The SELLER shall retain the right to stop or interrupt the display at any time if, in the opinion of the SELLER, conditions have become unsafe. In event of rain, fireworks may be rescheduled at a mutually agreeable date.

## **PAYMENT:**

**Contracted amount: \$40,000.00 inclusive of sales tax, if applicable.**

Contracted amount includes fire watch and permit fee.

All payments shall be paid by BUYER to and in the name of **RES Pyro** in the form of a company check, certified bank check, money order, or cash.

## **CANCELLATION:**

The Parties agree that should inclement weather prevent the fireworks display from occurring on July 4, 2026, the Contractor shall be entitled to a fee charge of Four Thousand and no/100ths Dollars (\$4,000.00). In the event of a cancellation for inclement weather, the fireworks display will be rescheduled to \_\_\_\_\_ or another mutually agreed upon date.

In the event the BUYER cancels this agreement any time during the contract period for a reason other than inclement weather, the SELLER shall be entitled to and receive 30% of the contracted fee for the remainder of the contract period plus compensation for any pre- and post-production costs incurred.

## **MISCELLANEOUS TERMS:**

It is agreed that nothing herein contained is intended, or should be construed in any manner, as creating or establishing the relationship of co-partners between the parties hereto, or as constituting the SELLER staff as the agents, representatives or employees of the BUYER for any purpose in any manner whatsoever. The SELLER and its staff are to be and shall remain an independent contractor with respect to all services performed under this Agreement. The SELLER represents that it has, or will secure at its own expense, any and all personnel required in performing services under this Agreement. Personnel, while engaged in the performance of any work or services required by the SELLER under this Agreement, shall not be considered employees of the BUYER, and any and all claims that may or might arise under the Workers' Compensation Act of the State of Minnesota, on behalf of said personnel or other persons while so engaged, and any and all claims whatsoever on behalf of any such person or personnel arising out of employment or alleged employment including, without limitation, claims of discrimination against the SELLER, its officers, agents, contractors or employees shall in no way be the responsibility of the BUYER, and the SELLER shall defend, indemnify and hold the BUYER, its officers, agents and employees harmless from any and all such claims regardless of any determination of any pertinent tribunal, agency, board, commission or court. Such personnel or other persons shall not require nor be entitled to any compensation, rights or benefits of any kind whatsoever from the BUYER, including, without limitation, tenure rights, medical

and hospital care, sick leave, Workers' Compensation, Unemployment Compensation, disability, severance pay and PERA.

SELLER shall defend, indemnify, and hold harmless the BUYER, its officers, employees and agents, from any and all claims causes of action, lawsuits, damages, losses or expenses, including attorney's fees, arising out of or resulting from the SELLER'S (including its officers, employees or agents) performance of the duties under this Agreement.

Any amendments to this Agreement shall be in writing and executed by the parties in the same manner as this Agreement.

**THIS AGREEMENT** shall be interpreted under the laws of the State of Minnesota.

The parties mutually and severally guarantee the terms, conditions, and payments of the Agreement, which shall be binding upon the parties, heirs, executors, administrators, successors and assigns.

**THIS AGREEMENT** shall not be assignable except at the written consent of the BUYER.

**THIS AGREEMENT** represents the entire agreement between the BUYER and the SELLER and supersedes and cancels any and all prior agreements or proposals, written or oral, between the parties relating to the subject matter hereof, and amendments, addenda, alterations or modifications to the terms and conditions of this Agreement shall be in writing and signed by both parties.

**IN WITNESS WHEREOF**, the parties hereunto set their names on the day and year listed below.

**CONTRACT VALID WHEN SIGNED BY AUTHORIZED PERSONS.**

BUYER: City of Lakeville

SELLER: Cory Stinar - RES Pyro

Title: Luke M. Hellier, Mayor

Title: Director of Services

Signature: \_\_\_\_\_

Signature:  \_\_\_\_\_

Date: 01/20/2026

Date: 1/12/2026

Title: Ann Orlofsky, City Clerk

Signature: \_\_\_\_\_

Date: 01/20/2026



**Date:** 1/20/2026

## **Approve Plans and Specifications and Set a Bid Date For the 214th Street Reconstruction Project**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve a resolution approving plans and specifications and setting a bid date for the 2026 214th Street Reconstruction Project, City Project 26-01.

### **Overview**

At its December 1, 2025 meeting, the Lakeville City Council ordered the improvements and authorized the preparation of plans and specifications for the 2026 214th Street Reconstruction Project, City Project 26-01.

Proposed improvements include roadway reconstruction through reclamation, subgrade corrections and installing a new sand section, full curb & gutter replacement, localized watermain utility construction (best management practices), and installation of new storm sewer. Project plans and specifications were prepared by WSB and are available for review in the Engineering Division. The estimated project cost is \$686,458. The City will publish notice and advertise for bids as required. Bids will be opened on February 26, 2026.

### **Supporting Information**

1. CP26-01 Resolution Setting Bid Date

<p><b>Financial Impact:</b> \$686,458    <b>Budgeted:</b> Yes    <b>Source:</b> Multiple Sources <b>Envision Lakeville Community Values:</b> Good Value for Public Service <b>Report Completed by:</b> Steve Ferraro, Public Works Coordinator</p>
--

**CITY OF LAKEVILLE**  
**RESOLUTION NO. 26-**

**Resolution Approving Plans and Specifications and Setting a Bid  
Date for 2026 214<sup>th</sup> Street Reconstruction Project, 26-01**

**WHEREAS**, WSB & Associates, Inc. prepared plans and specifications for the 214th Street Reconstruction Project (City Project 26-01).

**NOW, THEREFORE, BE IT RESOLVED**, by the City Council of the City of Lakeville, Minnesota:

That the plans and specifications for 214<sup>th</sup> Street City Project 26-01 are hereby approved by the City Council of the City of Lakeville, Minnesota;

**BE IT FURTHER RESOLVED**, that bids will be advertised as required and opened at 10:30 a.m. on Thursday, February 26, 2026 at the Lakeville City Hall, 20195 Holyoke Avenue, Lakeville, MN 55044, through the City of Lakeville’s online electronic bid system (BidVAULT). At that time bids will be opened and posted publicly by representatives of the City of Lakeville.

**ADOPTED** by the Lakeville City Council this 20<sup>th</sup> day of January 2026.

\_\_\_\_\_  
Luke M. Hellier, Mayor

\_\_\_\_\_  
Ann Orlofsky, City Clerk



**Date:** 1/20/2026

## **Purchase Agreement from EMI Audio for Grand Prairie Park Grandstand Audio System Equipment and Installation**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve purchase agreement from EMI Audio for Grand Prairie Park grandstand audio system equipment and installation.

### **Overview**

The construction of Grand Prairie Park was approved as part of the 2021 Park Bond Referendum. Construction of the park persists, and most amenities are anticipated to officially open this coming June. Current construction activities have primarily focused on completing the grandstand, including stadium seating and a press box. Staff collaborated with Lakeville Baseball Association to determine what amenities would be needed to provide the community with a state-of-the-art facility.

The press box will be equipped with a digital audio signal processor, wireless microphone receiver, four-channel amplifier, and a network switch. Additionally, speakers will be installed to cover the grandstand, concessions area, and beer garden. The purchase agreement proposal includes the purchase of all audio components and installation by EMI Audio's licensed and insured technicians. The purchase of equipment through EMI Audio also includes a lifetime loan program. In the event of equipment failure, EMI will provide comparable replacement equipment while repair is underway. The press box and audio amenities will be primarily used by the Lakeville Baseball Association; all users will be required to complete training on how to use the equipment appropriately.

### **Supporting Information**

1. EMI Audio Proposal Dated January 13, 2026
2. Purchase Agreement with EMI Audio for Grand Prairie Park Grandstand Audio System Equipment and Installation

<p><b>Financial Impact:</b> \$33,897.75    <b>Budgeted:</b> Yes    <b>Source:</b> Park Bond Referendum <b>Envision Lakeville Community Values:</b> Access to a Multitude of Natural Amenities and Recreational Opportunities <b>Report Completed by:</b> Joe Masiarchin, Parks and Recreation Director</p>
--



4719 42nd AVE N  
 Robbinsdale, MN 55422  
 www.EMIAudio.com  
 612-789-2496 Phone  
 612-789-2873 Fax

**Status: Quote**

Quote #: q16808

Quote To: Tue 1/13/2026 10:00AM

Operator: JEFF GEISLER

Customer #: 34451

CITY OF LAKEVILLE

Phone 952-985-4400

20195 HOLYOKE AVENUE  
 LAKEVILLE, MN 55044

Job Descr: Avonlea Grandstand

Ordered By: Joseph Masiarchin 952-985-4601

Sales Rep: Jeff Geisler 612-789-2496 Jeff@EMIAudio.com

This quote would install a sound system at the proposed Lakeville Avonlea Grandstand.

This audio system will consist of an equipment rack that will be installed in the pressbox. The equipment rack will house a digital audio signal processor, one wireless mic receiver, a 4 channel amplifier, a network switch and a power center.

We will install 5 new Bose AMU-208 speakers to cover the seating areas. They will be mounted as shown on the plan. An additional pair will be installed to cover the Concession/Beer Garden area and one more for the seating next to the 1st base dugout.

A wall plate with a Blue tooth input and auxiliary input will be mounted in the pressbox. There will also be two mic jacks for announcers. A mic and stand are also included. A wireless mic will be included to be used on the field.

A Bose CC-64 controller will be installed in a table top box for easy access and control by the announcers.

The system will be installed by our licensed and insured technicians.

It would be best if conduits would be installed for this system during the construction phase.

Qty	Items	Each	Price
8	BOSE AMU-208 BLACK	\$1,263.87	\$10,110.96
1	BOSE EX-1280 PROCESSOR	\$3,159.00	\$3,159.00
1	BOSE PSX2404D POWERSHARE AMP 2400W	\$3,437.28	\$3,437.28
1	BOSE CONTROLSPACE CC-64 CONTROL PANEL	\$1,010.00	\$1,010.00
1	Table Top Box for CC-64	\$300.00	\$300.00
1	LOWELL LWR1623 WALL MOUNT RACK	\$1,011.00	\$1,011.00
1	LOWELL LFD-16FV VENTED FRONT DOOR	\$356.00	\$356.00
1	FURMAN PL8C 15A POWER CENTER	\$309.00	\$309.00
2	EMI CUSTOM 50' UHF ANTENNA CABLE	\$137.90	\$275.80
1	SHURE QLXD-4 RECEIVER	\$747.00	\$747.00
1	SHURE QLXD2 SM58	\$472.00	\$472.00
1	RDL DD-BTN44 DANTE ENDPOINT	\$950.13	\$950.13
1	LIFT RENTAL FOR INSTALLATION	\$300.00	\$300.00
44	LABOR EMI AUDIO Begin at: Fri 5/17/2024 9:00:00AM System Installation	\$200.00	\$8,800.00
4	LABOR EMI AUDIO Begin at: Wed 1/24/2024 9:00:00AM System programming	\$200.00	\$800.00
150	WEST PENN 25291B 22-2 PLENUM	\$0.30	\$45.00
1	misc fasteners and raceway.	\$120.00	\$120.00
1	NETGEAR GS108PP-100NAS NETWORK SWITCH	\$181.64	\$181.64
1	SHURE VOCAL MIC W/SWITCH	\$119.00	\$119.00
1	GATOR WEIGHTED DESKTOP MIC STAND	\$14.99	\$14.99
650	WEST PENN AQ226 14-2 DIRECT BURIAL	\$2.01	\$1,306.50
1	HOSA 10FT XLR M TO XLR F CABLE	\$25.95	\$25.95
1	RDL DSXLR2F	\$28.50	\$28.50

**Quote valid for 7 days**

**Quote**

Quote valid for 7 days

<b>Sales:</b>	<b>\$33,879.75</b>
<b>Subtotal:</b>	<b>\$33,879.75</b>
<b>Total:</b>	<b>\$33,879.75</b>
<b>Paid:</b>	<b>\$0.00</b>
<b>Project Total:</b>	<b>\$33,879.75</b>

**Signature:** \_\_\_\_\_

**CITY OF LAKEVILLE**

**NON-BID CONTRACT  
FOR PURCHASE OF GOODS AND SERVICES**

**AGREEMENT** made this 20th day of January, 2026, by and between the **CITY OF LAKEVILLE**, a Minnesota municipal corporation ("City") and **EMI AUDIO**, a Minnesota corporation ("Contractor")

**IN CONSIDERATION OF THEIR MUTUAL COVENANTS, THE PARTIES AGREE AS FOLLOWS:**

**1. CONTRACT DOCUMENTS.** The following documents shall be referred to as the "Contract Documents," all of which shall be taken together as a whole as the contract between the parties as if they were set verbatim and in full herein:

- A. This Agreement.
- B. Contractor's Quote and attached agreement dated January 13, 2026

In the event of a conflict among the provisions of the Contract Documents, the order in which they are listed above shall control in resolving any such conflicts. Contract Document "A" has the first priority and Contract Document "B" has the last priority.

**2. CONTRACTOR OBLIGATIONS.** The Contractor shall provide the goods, services and perform the work in accordance with the Contract Documents ("Work"). Contractor shall provide all personnel, supervision, services, materials, tools, equipment and supplies and do all things necessary and ancillary thereto specified in the Contract Documents.

**3. CONTRACTOR'S REPRESENTATIONS.**

A. Contractor has examined and carefully studied the Contract Documents and other related data identified in the Contract Documents.

B. Contractor is familiar with and is satisfied as to all federal, state, and local Laws and Regulations that may affect cost, progress, and performance of the Work.

C. Contractor has given City written notice of all conflicts, errors, ambiguities, or discrepancies that Contractor has discovered in the Contract Documents, and the written resolution thereof by City is acceptable to Contractor.

D. The Contract Documents are generally sufficient to indicate and convey understanding of all terms and conditions for performance and furnishing of the Work.

**4. COMPENSATION.** Contractor shall be paid by the City for the goods and services described in accordance with the Quote, which is inclusive of reimbursable expenses. The fee shall not be adjusted even if the estimated number of hours to perform a task, or any other estimate,

assumption or matter is wrong or exceeded. Payment shall be made periodically after a service has been completed and within thirty-five (35) days of receipt of an invoice.

**5. COMPLETION DATE.** The Contractor shall complete the Work within a timeframe that is agreed upon between the Parties prior to the start of the project.

**6. WARRANTY.** The Contractor shall be held responsible for any and all defects in workmanship and materials and upon notification by the City shall immediately replace or repair the defective workmanship and materials without cost to the City. The Contractor warrants that only new unused materials will be used. The Contractor further warrants to the City that all materials and services furnished under the Contract will be in conformance with Contract Documents and that the goods are of merchantable quality and are fit for the use for which they are sold. These warranties are in addition to any manufacturer's standard warranty, and any warranty provided by law.

**7. RIGHTS AND REMEDIES.**

A. The duties and obligations imposed by the Contract Documents, and the rights and remedies available thereunder shall be in addition to, and not a limitation of, any duties, obligations, rights and remedies otherwise imposed or available by law.

B. No action, or failure to act, by the City or the Contractor shall constitute a waiver of any right or duty afforded any of them under the Contract, nor shall any such action or failure to act constitute an approval of, or acquiescence in, any breach there under, except as may be specifically agreed in writing.

**8. CHANGES TO WORK.** Without invalidating the Contract, the City may, at any time, or from time to time, order additions, deletions or revisions in the work provided under this Agreement; these will be authorized by an amendment to the Contract. Upon approval of an amendment, Contractor shall proceed with the work provided under the amendment. Changes in the Contract Price shall be based upon the prices identified in the Quote provided or negotiated between the parties based on similar work provided in the Proposal.

**9. UNAUTHORIZED WORK.** Additional work performed without authorization of an amendment of this Contract will not entitle Contractor to an increase in the Compensation or an extension of the Contract.

**10. DOCUMENTS.** The City shall be the owner of all documents, reports, studies, analysis and the like prepared by the Contractor in conjunction with this contract.

**11. COMPLIANCE WITH LAWS AND REGULATIONS.** In providing services hereunder, Contractor shall abide by all statutes, ordinances, rules and regulations pertaining to the provisions of goods and services to be provided.

**12. STANDARD OF CARE.** Contractor shall exercise the same degrees of care, skill, and diligence in the performance of the services as is ordinarily possessed and exercised by a professional Contractor under similar circumstances. No other warranty, expressed or implied, is

included in this Agreement. City shall not be responsible for discovering deficiencies in the accuracy of Contractor's services.

**13. INDEMNIFICATION.** To the fullest extent permitted by law, Contractor agrees to defend, indemnify and hold harmless the City, and its employees, officials, and agents from and against all claims, actions, damages, losses and expenses, including reasonable attorney fees, arising out of Contractor's negligence or its performance or failure to perform its obligations under this Contract. Contractor's indemnification obligation shall apply to subcontractor(s), or anyone directly or indirectly employed or hired by Contractor, or anyone for whose acts Contractor may be liable. Contractor agrees this indemnity obligation shall survive the completion or termination of this Contract.

**14. INSURANCE.** Prior to the start of the project, Contractor shall furnish to the City a certificate of insurance showing proof of the required insurance required under this Paragraph. Contractor shall take out and maintain or cause to be taken out and maintained until six (6) months after the City has accepted the public improvements, such insurance as shall protect Contractor and the City for work covered by the Contract including workers' compensation claims and property damage, bodily and personal injury which may arise from operations under this Contract, whether such operations are by Contractor or anyone directly or indirectly employed by either of them. The minimum amounts of insurance shall be as follows:

*Commercial General Liability (or in combination with an umbrella policy)*

\$2,000,000 Each Occurrence  
\$2,000,000 Products/Completed Operations Aggregate  
\$2,000,000 Annual Aggregate

The following coverages shall be included:

Premises and Operations Bodily Injury and Property Damage  
Personal and Advertising Injury  
Blanket Contractual Liability  
Products and Completed Operations Liability

*Automobile Liability*

\$2,000,000 Combined Single Limit – Bodily Injury & Property Damage  
Including Owned, Hired & Non-Owned Automobiles

*Workers Compensation*

Workers' Compensation insurance in accordance with the statutory requirements of the State of Minnesota, including Employer's Liability with minimum limits are as follows:

\$500,000 – Bodily Injury by Disease per employee  
\$500,000 – Bodily Injury by Disease aggregate  
\$500,000 – Bodily Injury by Accident

The Contractor's insurance must be "Primary and Non-Contributory".

All insurance policies (or riders) required by this Contract shall be (i) taken out by and maintained with responsible insurance companies organized under the laws of one of the states of the United States and qualified to do business in the State of Minnesota, (ii) shall name the City, its employees and agents as additional insureds (CGL and umbrella only) by endorsement which shall be filed with the City. **A copy of the endorsement must be submitted with the certificate of insurance.**

Contractor's policies and Certificate of Insurance shall contain a provision that coverage afforded under the policies shall not be cancelled without at least thirty (30) days' advanced written notice to the City, or ten (10) days' notice for non-payment of premium.

An Umbrella or Excess Liability insurance policy may be used to supplement Contractor's policy limits on a follow-form basis to satisfy the full policy limits required by this Contract.

**15. INDEPENDENT CONTRACTOR.** The City hereby retains the Contractor as an independent contractor upon the terms and conditions set forth in this Agreement. The Contractor is not an employee of the City and is free to contract with other entities as provided herein. Contractor shall be responsible for selecting the means and methods of performing the work. Contractor shall furnish any and all supplies, equipment, and incidentals necessary for Contractor's performance under this Agreement. City and Contractor agree that Contractor shall not at any time or in any manner represent that Contractor or any of Contractor's agents or employees are in any manner agents or employees of the City. Contractor shall be exclusively responsible under this Agreement for Contractor's own FICA payments, workers compensation payments, unemployment compensation payments, withholding amounts, and/or self-employment taxes if any such payments, amounts, or taxes are required to be paid by law or regulation.

**16. SUBCONTRACTORS.** Contractor shall not enter into subcontracts for services provided under this Agreement without the express written consent of the City. Contractor shall comply with Minnesota Statute § 471.425. Contractor must pay Subcontractor for all undisputed services provided by Subcontractor within ten days of Contractor's receipt of payment from City. Contractor must pay interest of 1.5 percent per month or any part of a month to Subcontractor on any undisputed amount not paid on time to Subcontractor. The minimum monthly interest penalty payment for an unpaid balance of \$100 or more is \$10.

**17. ASSIGNMENT.** Neither party shall assign this Agreement, nor any interest arising herein, without the written consent of the other party.

**18. WAIVER.** Any waiver by either party of a breach of any provisions of this Agreement shall not affect, in any respect, the validity of the remainder of this Agreement.

**19. ENTIRE AGREEMENT.** The entire agreement of the parties is contained herein. This Agreement supersedes all oral agreements and negotiations between the parties relating to the subject matter hereof as well as any previous agreements presently in effect between the parties relating to the subject matter hereof. Any alterations, amendments, deletions, or waivers of the provisions of this Agreement shall be valid only when expressed in writing and duly signed by the parties, unless otherwise provided herein.

**20. CONTROLLING LAW.** This Agreement shall be governed by and construed in accordance with the laws of the State of Minnesota.

**21. COPYRIGHT.** Contractor shall defend actions or claims charging infringement of any copyright or patent by reason of the use or adoption of any designs, drawings or specifications supplied by it, and it shall hold harmless the City from loss or damage resulting there from.

**22. RECORDS/AUDIT.** The Contractor shall maintain complete and accurate records of time and expense involved in the performance of services. Pursuant to Minnesota Statutes § 16C.05, Subd. 5, any books, records, documents, and accounting procedures and practices of City and Contractor relevant to the Agreement are subject to examination by City and Contractor, and either the Legislative Auditor or the State Auditor as appropriate. City and Contractor agree to maintain these records for a period of six years from the date of performance of all services covered under this Agreement.

**23. MINNESOTA GOVERNMENT DATA PRACTICES ACT.** Contractor must comply with the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as it applies to (1) all data provided by the City pursuant to this Agreement, and (2) all data, created, collected, received, stored, used, maintained, or disseminated by the Contractor pursuant to this Agreement. Contractor is subject to all the provisions of the Minnesota Government Data Practices Act, including but not limited to the civil remedies of Minnesota Statutes Section 13.08, as if it were a government entity. In the event Contractor receives a request to release data, Contractor must immediately notify City. City will give Contractor instructions concerning the release of the data to the requesting party before the data is released. Contractor agrees to defend, indemnify, and hold City, its officials, officers, agents, employees, and volunteers harmless from any claims resulting from Contractor's officers', agents', city's, partners', employees', volunteers', assignees' or subcontractors' unlawful disclosure and/or use of protected data. The terms of this paragraph shall survive the cancellation or termination of this Agreement.

**24. TERMINATION.** This Agreement may be terminated by City on two (2) days' written notice delivered to Contractor at the address on file with the City. Upon termination under this provision if there is no fault of the Contractor, the Contractor shall be paid for goods and services rendered and reimbursable expenses until the effective date of termination. If the City terminates the Agreement because the Contractor has failed to perform in accordance with this Agreement, no further payment shall be made to the Contractor, and the City may retain another Contractor to undertake or complete the work identified in this Agreement.

*[Signature page follows.]*

Dated: \_\_\_\_\_, 2026

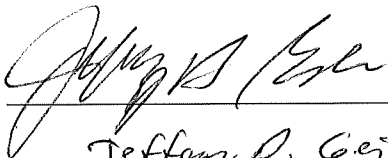
**CITY OF LAKEVILLE**

By: \_\_\_\_\_  
Luke Hellier, Mayor

By: \_\_\_\_\_  
Ann Orlofsky, City Clerk

Dated: 1-13-\_\_\_\_\_, 2026

**CONTRACTOR:  
EMI AUDIO**

By:   
\_\_\_\_\_  
Jeffrey D. Geisler [print name]

Its Sec/treas. [title]



**Date:** 1/20/2026

## **Professional Services Agreement for a Compensation Study**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve the professional services agreement to engage in a compensation study with Evergreen Solutions, LLC for 2026.

### **Overview**

The City of Lakeville last completed a comprehensive compensation study in 2018. Since that time, labor market conditions, recruitment and retention trends, and compensation practices among comparable public agencies have continued to evolve. Conducting a compensation study on a regular basis is best practice to ensure the City remains competitive, equitable and fiscally responsible.

The study will provide objective data and recommendations to assist the City in making informed decisions related to employee compensation. Any recommended changes resulting from the study will be brought forward in the future for Council consideration.

### **Supporting Information**

1. Signed Professional Services Agreement - Evergreen Solutions, LLC
2. Evergreen Solutions, LLC Proposal

<p><b>Financial Impact:</b> \$32,500    <b>Budgeted:</b> Yes    <b>Source:</b> Good Value for Public Service <b>Envision Lakeville Community Values:</b> <b>Report Completed by:</b> Alissa Frey, Human Resources Director</p>
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## PROFESSIONAL SERVICES AGREEMENT

**AGREEMENT** made this \_\_\_\_\_ day of \_\_\_\_\_, 2026, by and between the **CITY OF LAKEVILLE**, a Minnesota municipal corporation ("City") and **EVERGREEN SOLUTIONS, LLC**, a Florida limited liability company ("Consultant").

**IN CONSIDERATION OF THEIR MUTUAL COVENANTS, THE PARTIES AGREE AS FOLLOWS:**

**1. CONTRACT DOCUMENTS.** The Contract consists of the following documents. In the event of conflict among the documents, the conflict shall be resolved by the order in which they are listed, with the document listed first having the first priority and the document listed last having the last priority:

- A. This Professional Services Agreement;
- B. City's Request for Proposals for a Compensation Study for the Lakeville, dated October 23, 2025;
- C. Consultant's Proposal dated November 28, 2025 ("Proposal").

In the event of conflict among the provisions of the Contract Documents, the order in which they are listed above shall control in resolving any such conflicts. Contract Document "A" has the first priority and Contract Document "C" has the last priority.

**2. SCOPE OF SERVICES.** The City retains Consultant to provide commissioning authority services as provided in the Contract Documents. Consultant agrees to complete the services under this Agreement substantially within the time frames identified in the Contract Documents with a final completion date of March 30, 2026.

**3. COMPENSATION.** Consultant shall be paid thirty-Two Thousand, Five hundred and no/100 Dollars (\$32,500.00) by the City, which fee is inclusive of reimbursables, expenses, taxes and other charges. The fee shall not be adjusted if the estimated hours to perform a task, the number of estimated required meetings or any other estimate or assumption are exceeded. Consultant shall be paid according to the invoice/payment schedule as follows:

- 33% - upon completion of Tasks 1 – 2
- 33% - upon completion of Task 3
- 34% - upon completion of Tasks 4 – 6

The City will normally pay an invoice within 35 days of receipt.

**4. CHANGE ORDERS.** All change orders, regardless of amount, must be approved in advance and in writing by the City. No payment will be due or made for work done in advance of such approval.

**5. DOCUMENTS.** All reports, plans, models, software, diagrams, analyses, and information generated in connection with performance of this Agreement shall be the property of the City. The City may use the information for its purposes. The City shall be the copyright owner. The vesting of the City's ownership of the copyright in materials created by the Consultant shall be contingent upon the City's fulfillment of its payment obligations hereunder. The Consultant shall be allowed to use a description of the services provided hereunder, including the name of the City, and photographs or renderings of any projects which develop from the planning or other services provided by the Consultant, in the normal course of its marketing activities.

**6. COMPLIANCE WITH LAWS AND REGULATIONS.** In providing services hereunder, Consultant shall abide by all statutes, ordinances, rules and regulations pertaining to the provisions of services to be provided.

**7. STANDARD OF CARE.** Consultant shall exercise the same degrees of care, skill, and diligence in the performance of the services as is ordinarily possessed and exercised by a professional consultant under similar circumstances. No other warranty, expressed or implied, is included in this Agreement. City shall not be responsible for discovering deficiencies in the accuracy of Consultant's services.

**8. INDEMNIFICATION.** Consultant shall indemnify and hold harmless the City, its officers, agents, and employees, of and from any and all claims, demands, actions, causes of action, including costs and attorney's fees, arising out of or by reason of the execution or performance of the work or services provided for herein and further agrees to defend at its sole cost and expense any action or proceeding commenced for the purpose of asserting any claim of whatsoever character arising hereunder.

**9. INSURANCE.** Prior to the start of the project, Consultant shall furnish to the City a certificate of insurance showing proof of the required insurance required under this Paragraph. Consultant shall take out and maintain or cause to be taken out and maintained until six (6) months after the City has accepted the public improvements, such insurance as shall protect Consultant and the City for work covered by the Contract including workers' compensation claims and property damage, bodily and personal injury which may arise from operations under this Contract, whether such operations are by Consultant or anyone directly or indirectly employed by either of them. The minimum amounts of insurance shall be as follows:

*Commercial General Liability (or in combination with an umbrella policy)*

\$2,000,000 Each Occurrence

\$2,000,000 Products/Completed Operations Aggregate

\$2,000,000 Annual Aggregate

The following coverages shall be included:

Premises and Operations Bodily Injury and Property Damage

Personal and Advertising Injury

Blanket Contractual Liability

Products and Completed Operations Liability

*Automobile Liability*

\$2,000,000 Combined Single Limit – Bodily Injury & Property Damage

Including Owned, Hired & Non-Owned Automobiles

*Workers Compensation*

Except as provided below, Consultant must provide Workers' Compensation insurance for all its employees and, in case any work is subcontracted, Consultant will require the subcontractor to provide Workers' Compensation insurance in accordance with the statutory requirements of the State of Minnesota, including Coverage B, Employer's Liability. Insurance minimum limits are as follows:

- \$500,000 – Bodily Injury by Disease per employee
- \$500,000 – Bodily Injury by Disease aggregate
- \$500,000 – Bodily Injury by Accident

If Minnesota Statute 176.041 exempts Consultant from Workers' Compensation insurance or if the Consultant has no employees in the City, Consultant must provide a written statement, signed by an authorized representative, indicating the qualifying exemption that excludes Consultant from the Minnesota Workers' Compensation requirements. If during the course of the contract the Consultant becomes eligible for Workers' Compensation, the Consultant must comply with the Workers' Compensation insurance requirements herein and provide the City with a certificate of insurance.

*Professional/Technical (Errors and Omissions) Liability Insurance*

This policy will provide coverage for all claims the Consultant may become legally obligated to pay resulting from any actual or alleged negligent act, error, or omission related to Consultant's professional services required under the contract. Consultant is required to carry the following minimum limits:

- \$1,000,000 – per claim or event
- \$2,000,000 – annual aggregate

Any deductible will be the sole responsibility of the Consultant and may not exceed \$50,000 without the written approval of the City. If the Consultant desires authority from the City to have a deductible in a higher amount, the Consultant shall so request in writing, specifying the amount of the desired deductible and providing financial documentation by submitting the most current audited financial statements so that the City can ascertain the ability of the Consultant to cover the deductible from its own resources.

The retroactive or prior acts date of such coverage shall not be after the effective date of this Contract and Consultant shall maintain such insurance for a period of at least three (3) years, following completion of the work. If such insurance is discontinued, extended reporting period coverage must be obtained by Consultant to fulfill this requirement.

The Consultant's insurance must be "Primary and Non-Contributory".

All insurance policies (or riders) required by this Contract shall be (i) taken out by and maintained with responsible insurance companies organized under the laws of one of the states of the United States and qualified to do business in the State of Minnesota, (ii) shall name the City, its employees and agents as additional insureds (CGL and umbrella only) by endorsement which shall be filed with the City. **A copy of the endorsement must be submitted with the certificate of insurance.**

Consultant's policies and Certificate of Insurance shall contain a provision that coverage afforded under the policies shall not be cancelled without at least thirty (30) days' advanced written notice to the City, or ten (10) days' notice for non-payment of premium.

An Umbrella or Excess Liability insurance policy may be used to supplement Consultant's policy limits on a follow-form basis to satisfy the full policy limits required by this Contract.

**10. INDEPENDENT CONTRACTOR.** The City hereby retains Consultant as an independent contractor upon the terms and conditions set forth in this Agreement. Consultant is not an employee of the City and is free to contract with other entities as provided herein. Consultant shall be responsible for selecting the means and methods of performing the work. Consultant shall furnish any and all supplies, equipment, and incidentals necessary for Consultant's performance under this Agreement. City and Consultant agree that Consultant shall not at any time or in any manner represent that Consultant or any of Consultant's agents or employees are in any manner agents or employees of the City. Consultant shall be exclusively responsible under this Agreement for Consultant's own FICA payments, workers compensation payments, unemployment compensation payments, withholding amounts, and/or self-employment taxes if any such payments, amounts, or taxes are required to be paid by law or regulation.

**11. SUBCONTRACTORS.** With the exception of the individuals identified in the Proposal, Consultant shall not enter into subcontracts for services provided under this Agreement without the express written consent of the City. Consultant shall comply with Minnesota Statutes §471.425. Consultant must pay subcontractors for all undisputed services provided by subcontractors within ten (10) days of Consultant's receipt of payment from City. Consultant must pay interest of one and five-tenths (1.5%) percent per month or any part of a month to subcontractors on any undisputed amount not paid on time to subcontractors. The minimum monthly interest penalty payment for an unpaid balance of One Hundred Dollars (\$100.00) or more is Ten Dollars (\$10.00).

**12. ASSIGNMENT.** Neither party shall assign this Agreement, nor any interest arising herein, without the written consent of the other party.

**13. WAIVER.** Any waiver by either party of a breach of any provisions of this Agreement shall not affect, in any respect, the validity of the remainder of this Agreement.

**14. ENTIRE AGREEMENT.** The entire agreement of the parties is contained herein. This Agreement supersedes all oral agreements and negotiations between the parties relating to the subject matter hereof as well as any previous agreements presently in effect between the parties relating to the subject matter hereof. Any alterations, amendments, deletions, or waivers of the provisions of this Agreement shall be valid only when expressed in writing and duly signed by the parties, unless otherwise provided herein.

**15. CONTROLLING LAW/VENUE.** This Agreement shall be governed by and construed in accordance with the laws of the State of Minnesota. In the event of litigation, the exclusive venue shall be in the District Court of the State of Minnesota for Dakota County.

**16. COPYRIGHT.** Consultant shall defend actions or claims charging infringement of any copyright or patent by reason of the use or adoption of any designs, drawings or specifications supplied by it, and it shall hold harmless the City from loss or damage resulting there from.

**17. PATENTED DEVICES, MATERIALS AND PROCESSES.** If the contract requires, or Consultant desires, the use of any design, devise, material or process covered by letters, patent or copyright, trademark or trade name, Consultant shall provide for such use by suitable legal agreement with the patentee or owner and a copy of said agreement shall be filed with the City. If no such agreement is made or filed as noted, Consultant shall indemnify and hold harmless the City from any and all claims for infringement by reason of the use of any such patented designed, device, material or process, or any trademark or trade name or copyright in connection with the services agreed to be

performed under the contract, and shall indemnify and defend the City for any costs, liability, expenses and attorney's fees that result from any such infringement.

**18. RECORDS.** Consultant shall maintain complete and accurate records of time and expense involved in the performance of services.

**19. AUDIT DISCLOSURE AND DATA PRACTICES.** Any reports, information, data, etc. given to, or prepared or assembled by the Consultant under this Agreement which the City requests to be kept confidential, shall not be made available to any individual or organization without the City's prior written approval. The books, records, documents and accounting procedures and practices of the Consultant or other parties relevant to this Agreement are subject to examination by the City and either the Legislative Auditor or the State Auditor for a period of six (6) years after the effective date of this Agreement. Pursuant to Minnesota Statutes § 13.05, Subd. 11, all of the data created, collected, received, stored, used, maintained, or disseminated by the Contractor in performing this Contract is subject to the requirements of the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, and the Contractor must comply with those requirements as if it were a government entity. The remedies in Minnesota Statutes § 13.08 apply to the Contractor. The Contractor does not have a duty to provide access to public data to the public if the public data are available from the City, except as required by the terms of the Contract. All subcontracts entered into by Consultant in relation to this Agreement shall contain similar Data Practices Act compliance language. All subcontracts entered into by Consultant in relation to this Agreement shall contain similar Data Practices Act compliance language.

**20. NON-DISCRIMINATION.** The Consultant agrees during the life of this Agreement not to discriminate against any employee, application for employment, or other individual because of race, color, sex, age, creed, national origin, sexual preference, or any other basis prohibited by federal, state, or local law. The Consultant will include a similar provision in all subcontracts entered into for performance of this Agreement.

**21. TERMINATION OF THE AGREEMENT.** The City may terminate this Agreement or any part thereof at any time, upon written notice to Consultant, effective upon delivery including delivery by facsimile or email. In such event, Consultant will be entitled to compensation for work performed up to the date of termination or, in the case of a lump sum contract, based upon a pro rata basis.

**22. NOTICES.** All notices, demands or requests required or permitted to be made pursuant to or under this Agreement must be in writing and deemed valid if sent by registered mail, return receipt requested, or delivered by overnight delivery service providing written evidence of delivery, or by hand delivery by a reputable independent courier providing written evidence of delivery, addressed as follows:

CITY:  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville MN 55044  
Attention: City Administrator

CONSULTANT:  
Evergreen Solutions, LLC  
2528 Barrington Circle, Unit 201  
Tallahassee, Florida 32308  
Attention: Dr. Jeff Ling, President

Either party may change the designated recipient of notice by so notifying the other party in writing.

*[Remainder of page intentionally left blank]*  
*[Signature pages to follow]*

**IN WITNESS WHEREOF**, the parties have executed this Agreement on the date first above written. By the signature of its representative below, each party affirms that it has taken all necessary action to authorize said representative to execute the Agreement.

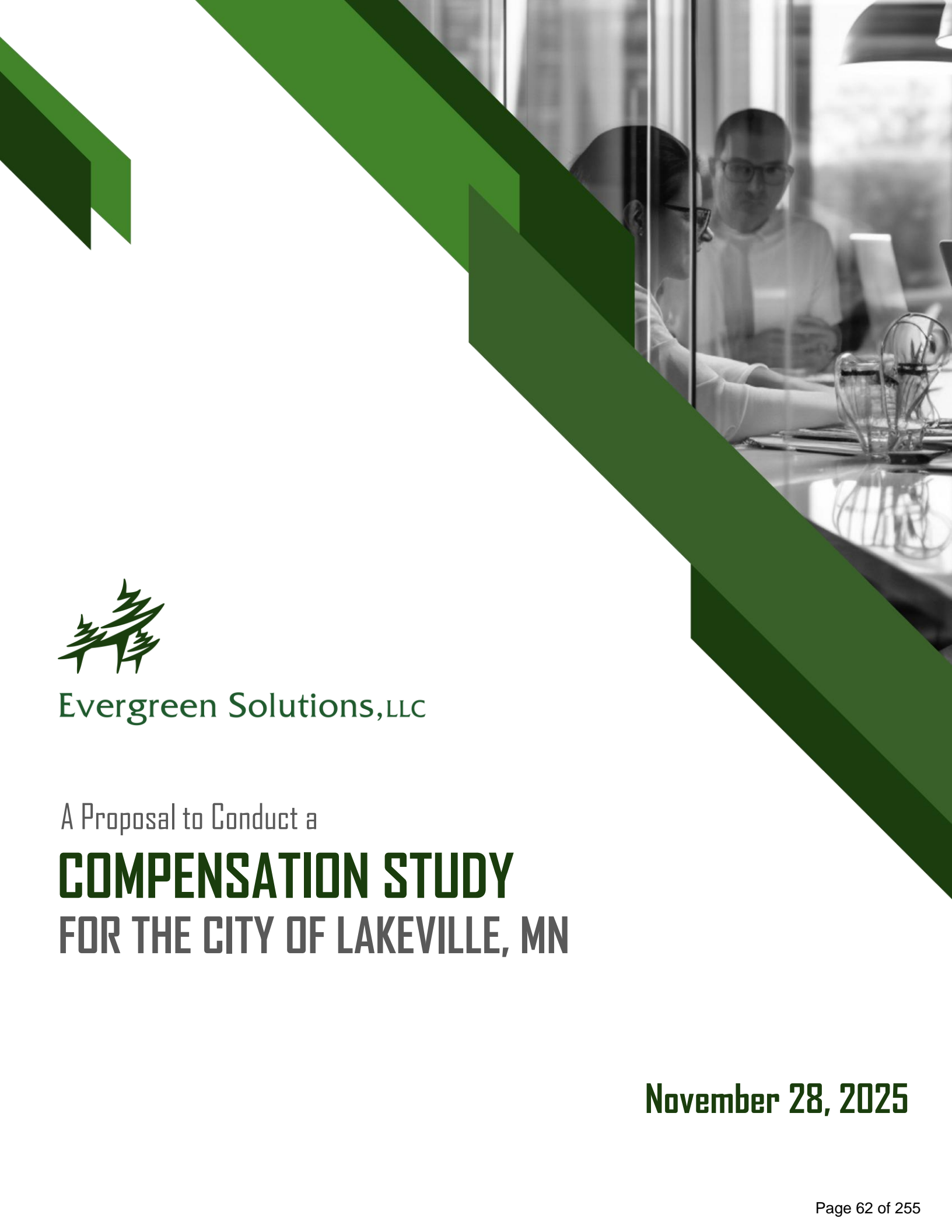
**CITY OF LAKEVILLE**

BY: \_\_\_\_\_  
Luke M. Hellier, Mayor

AND \_\_\_\_\_  
Ann Orlofsky, City Clerk

**EVERGREEN SOLUTIONS, LLC**

BY: \_\_\_\_\_  
Jeff Ling, President



Evergreen Solutions, LLC

A Proposal to Conduct a

**COMPENSATION STUDY**  
**FOR THE CITY OF LAKEVILLE, MN**

**November 28, 2025**



# Evergreen Solutions, LLC

2528 Barrington Circle • Unit #201 • Tallahassee, Florida 32308  
850.383.0111 • fax 850.383.1511

---

November 25, 2025

Alissa Frey  
Human Resources Director  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville, Minnesota 55044

Dear Ms. Frey:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Compensation Study for the City of Lakeville. Our response is based on our review of your Request for Quote, our experience working with hundreds of local governments and other public sector organizations throughout the country, our understanding of the Minnesota labor market, and our knowledge of best practices in local government human resources management. **Evergreen is well qualified to provide the services being requested by the City of Lakeville as we have conducted more than 1,500 similar studies for local governments and other public sector organizations throughout the country.**

Evergreen Solutions was formed in 2004 in Florida to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 47 states. In the State of Minnesota, Evergreen Solutions has worked with the following public sector clients in providing work similar in scope to the services being requested: City of Minneapolis; City of Rochester; Saint Paul Public Schools; Osseo Area Schools; and Stillwater Area Public Schools.

In other states, Evergreen has worked with, or is currently on contract to work with, the following local governments in providing work similar in scope to the services being requested: Genesee County, MI; City of Pittsburgh, PA; County of Montgomery, PA; Mahoning County, OH; Blount County, TN; Madison County, TN; Jefferson County, TN; City of White House, TN; City of Murfreesboro, TN; City of Clarksville, TN; City of Cleveland, TN; City of Winchester, KY; City of Bloomington, IN; City of Urbana, IL; City of Moline, IL; McLean County, IL; City of Portland, ME; City of Manchester, NH; City of Portsmouth, NH; Town of Wethersfield, CT; Town of Plainville, CT; Town of Bridgewater, MA; City of Cambridge, MA; Genesee County, NY; Livingston County, NY; City of Seaford, DE; City of Milford, DE; City of Laurel, MD; City of Hyattsville, MD; City of Baltimore, MD; City of Takoma Park, MD; City of Annapolis, MD; City of Westminster, MD; Town of Ocean City, MD; Harford County, MD; Frederick County, MD; Talbot County, MD; Allegany County, MD; City of Newport News, VA; City of Norfolk, VA; City of Petersburg, VA; City of Fredericksburg, VA; City of Falls Church, VA; City of Hopewell, VA; City of Williamsburg, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Chesterfield County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Shenandoah County, VA; Prince George County, VA; Loudoun County, VA; Spotsylvania County, VA; King George County, VA; Alleghany County, VA; Union County, NC; Gaston County, NC; New Hanover County, NC; Guilford County, NC; Harnett County, NC; Town of Chapel Hill, NC; Franklin County, NC; Onslow County, NC; Buncombe County, NC; City of Burlington, NC; City of Raleigh, NC; City of Goldsboro, NC; City of High Point, NC; City of Fayetteville, NC; City of Bennettsville, SC; City of Clemson, SC; City of Folly Beach, SC; City of Columbia, SC; City of Lancaster, SC; City of Greenwood, SC; City of Mauldin, SC; City of Pickens, SC; City of Isle of Palms, SC; Pickens County, SC; Berkeley County, SC; Charleston County, SC; Dorchester County, SC; Dillon County, SC; Spartanburg County, SC; Laurens County, SC; Oconee County, SC; Beaufort County, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; City of Douglasville, GA; City of Atlanta, GA; City of Alpharetta, GA; City of Riverdale, GA; City of Garden City, GA; City of Cedartown, GA; City of Union City, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Norcross, GA; City of Dunwoody, GA; City of Clarkston, GA; City of Roswell, GA; City of Milton, GA; City of Sandersville, GA; City of Tybee Island, GA; City of Chamblee, GA; City of Savannah, GA; Lumpkin County, GA; Douglas County, GA; DeKalb County, GA; Cherokee County, GA; Spalding County, GA; City of Sarasota, FL; City of Jacksonville Beach, FL; City of New Smyrna Beach, FL; City of Orlando, FL; City of Palm Beach Gardens, FL; City of Panama City, FL; City of Hollywood, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Alachua County, FL; Manatee County, FL; Pinellas County, FL; Orange County, FL; Sarasota County, FL; City of Mobile, AL; City of Opelika, AL; City of Foley, AL; City of Auburn, AL; Baldwin County, AL; Chambers County, AL; Lee County, AL; City of Hot Springs, AR; City of Broken Arrow, OK; City of Lee's Summit, MO; City of St. Peters, MO; City of St. Louis, MO; City of Branson, MO; City of Dardenne Prairie, MO; City of Columbia, MO; City of Troy, MO;

Jasper County, MO; Jefferson County, MO; Jackson County, MO; St. Charles County, MO; Sedwick County, KS; Shawnee County, KS; City of Leawood, KS; City of Salina, KS; City of Shawnee, KS; Ft. Bend County, TX; Hood County, TX; Aransas County, TX; Jefferson County, TX; Brazoria County, TX; Kaufman County, TX; Matagorda County, TX; Denton County, TX; Travis County, TX; Town of Little Elm, TX; City of Kingsville, TX; City of Denton, TX; City of Odessa, TX; City of Cleburne, TX; City of Austin, TX; City of Coppell, TX; City of Fate, TX; City of Seguin, TX; City of Wharton, TX; City of Fair Oaks Ranch, TX; City of Three Rivers, TX; City of Portland, TX; City of Port Arthur, TX; City of Big Spring, TX; City of Pflugerville, TX; City of Buda, TX; City of Montgomery, TX; City of Farmers Branch, TX; City of Alpine, TX; City of Fredericksburg, TX; City of Gonzalez, TX; City of Haskell, TX; City of La Porte, TX; City of Del Rio, TX; City of Conroe, TX; City of Amarillo, TX; City of Mont Belvieu, TX; City of Duncanville, TX; City of Sunset Valley, TX; The Woodlands Township, TX; Town of Prosper, TX; City of Fountain, CO; City of Manitou Springs, CO; Garfield County, CO; Grand County, CO; City of Boulder City, NV; Ogden City Corporation, UT; City of Page, AZ; City of Prescott, AZ; City of Flagstaff, AZ; Yavapai County, AZ; Town of Prescott Valley, AZ; City of Carlsbad, NM; City of Albuquerque, NM; City of Santa Fe, NM; City of Fresno, CA; City of Thousand Oaks, CA; City of Crescent City, CA; City of Camarillo, CA; City of West Hollywood, CA; City of Bell Gardens, CA; City of Moorpark, CA; City of Sacramento, CA; City of Beaumont, CA; City of Yucaipa, CA; City of Sanger, CA; City of Santa Ana, CA; Inyo County, CA; Calaveras County, CA; Mariposa County, CA; City of Bend, OR; City of Portland, OR; City of Albany, OR; Columbia County, OR; Spokane County, WA; City of Ridgefield, WA; City of Bellingham, WA; City of Washougal, WA; and many others. Information regarding the services provided to some of these clients as they relate to the services being requested can be found in **Section 1** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Lakeville because of our vast understanding of local government human resources and the fact that we possess the necessary experience and expertise. Our team has significant expertise in conducting compensation studies for local governments and other public sector organizations throughout the country as can be seen in **Section 2** of our proposal.

Some of the human resource services Evergreen has focused on include: compensation studies; classification studies; salary and benefits surveys; pay equity studies; staffing studies; workload analyses; performance evaluation and appraisal system design; HR department reviews; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability. Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management. As a result, our team knows how critical an effective compensation system is to the overall operation of a proficient and progressive municipality. Moreover, we have developed helpful methods and tools that assist our local government clients in implementing and maintaining our study recommendations.

Evergreen's approach to conducting a compensation study draws not only from extensive human resources work with local government clients, but also from direct feedback from our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach as identified in **Section 3** of our proposal includes:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, leadership, and select employees need to be involved in the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.
- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement.

We appreciate this opportunity and commit to you our best effort if selected for this engagement. If you have any questions, please feel free to contact me at (850) 383-0111 or via email at [jeff@consultevergreen.com](mailto:jeff@consultevergreen.com).

Sincerely,



Jeffrey Ling, PhD, President



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*Section 1.0*  
*Firm's Qualifications*



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# 1.0 Firm's Qualifications

Evergreen Solutions, LLC is well qualified to conduct a Compensation Study for the City of Lakeville due to our experience in conducting more than 1,500 similar studies for local governments and other public sector organizations across the country. In this section, we provide you with our firm's profile and history; and a list of similar studies we have conducted or are currently under contract to conduct.

## 1.1 Firm's Profile and History

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of local governments, across the nation. We provide a unique approach, rather than the "consulting as usual" approach, by partnering with our clients to find innovative, real-world solutions to public management.

Evergreen Solutions was formed in 2004 as a limited liability company to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen's philosophy is based on an understanding that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen employs 23 full-time and three part-time employees who work on one of five consultant teams providing a variety of human resource management consulting.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: classification and compensation studies; salary and benefit studies; staffing studies; workload analyses; performance appraisal reviews; disparity studies; training assessments; and strategic planning.

We invite you to browse our Web site at [www.ConsultEvergreen.com](http://www.ConsultEvergreen.com) or visit us on Facebook at [www.facebook.com](http://www.facebook.com) or LinkedIn at [www.linkedin.com](http://www.linkedin.com) for more information about our services, staff, and past experience.



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Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes:

- full visibility into the entire organization through research and discovery;
- a spirit of partnership with staff and leadership;
- sound recommendations based on best practices and proven methods; and
- a practical go-forward plan that leads to results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting compensation studies for local governments and other public sector organizations throughout the country;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant Minnesota statutes and regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 47 states throughout the country. **Exhibit 1-1** includes a sample list of the local government clients we have worked with, or are currently under contract to work with, in providing work similar in scope to the services being requested.



**Exhibit 1-1: Sample List of Local Government Clients**

Spokane County, WA	City of Leawood, KS	Douglas County, GA	Dare County, NC
City of Ridgefield, WA	Sedgwick County, KS	Forsyth County, GA	Franklin County, NC
City of Washougal, WA	Shawnee County, KS	Columbus Consolidated Gov't, GA	Ashe County, NC
City of Bellingham, WA	City of St. Louis, MO	City of Boca Raton, FL	Guilford County, NC
City of Albany, OR	City of Lee's Summit, MO	City of Clearwater, FL	Onslow County, NC
City of Bend, OR	City of Columbia, MO	City of Fort Myers, FL	Jackson County, NC
City of Portland, OR	City of Dardenne Prairie, MO	City of Gainesville, FL	New Hanover County, NC
Columbia County, OR	City of Jefferson, MO	City of Jacksonville, FL	Transylvania County, NC
City of Fresno, CA	City of Troy, MO	City of Key West, FL	Union County, NC
City of Camarillo, CA	City of St. Peters, MO	City of Pensacola, FL	City of Falls Church, VA
City of Yucaipa, CA	Jackson County, MO	City of Orlando, FL	City of Fredericksburg, VA
City of Long Beach, CA	St. Charles County, MO	City of Sarasota, FL	City of Newport News, VA
City of Sacramento, CA	Jasper County, MO	City of Palm Beach Gardens, FL	City of Williamsburg, VA
City of Thousand Oaks, CA	City of Bloomington, IN	City of North Miami Beach, FL	City of Norfolk, VA
City of Crescent City, CA	Blount County, TN	Alachua County, FL	Chesterfield County, VA
City of West Hollywood, CA	Madison County, TN	Brevard County, FL	County of Culpeper, VA
City of Santa Ana, CA	City of Murfreesboro, TN	Flagler County, FL	County of Northampton, VA
City of Sacramento, CA	City of Clarksville, TN	Hernando County, FL	County of York, VA
Calaveras County, CA	City of Morristown, TN	Manatee County, FL	Essex County, VA
Inyo County, CA	City of White House, TN	Martin County, FL	Gloucester County, VA
City of Boulder City, NV	City of Cleveland, TN	Miami-Dade County, FL	Isle of Wight County, VA
Ogden City Corporation, UT	City of Winchester, KY	Monroe County, FL	James City County, VA
City of Flagstaff, AZ	City of Urbana, IL	Palm Beach County, FL	King George County, VA
City of Page, AZ	City of Moline, IL	Orange County, FL	Loudoun County, VA
City of Prescott, AZ	McLean County, IL	Pinellas County, FL	Montgomery County, VA
Yavapai County, AZ	Mahoning County, OH	Sarasota County, FL	City of Takoma Park, MD
City of Carlsbad, NM	City of Auburn, AL	Seminole County, FL	City of Baltimore, MD
City of Santa Fe, NM	City of Mobile, AL	City of Beaufort, SC	City of Annapolis, MD
City of Albuquerque, NM	City of Foley, AL	City of Spartanburg, SC	City of Hagerstown, MD
Grand County, CO	City of Daphne, AL	City of Chester, SC	City of Hyattsville, MD
Garfield County, CO	City of Madison, AL	City of Clemson, SC	City of Westminster, MD
City of Fountain, CO	City of Northport, AL	City of Columbia, SC	City of Laurel, MD
City of Manitou Springs, CO	Baldwin County, AL	City of Isle of Palms, SC	Prince Georges County, MD
City of Amarillo, TX	Lee County, AL	City of Conway, SC	Allegany County, MD
City of Austin, TX	Chambers County, AL	City of Goose Creek, SC	Talbot County, MD
City of Buda, TX	Shelby County, AL	City of Lancaster, SC	Washington County, MD
City of Denton, TX	City of Alpharetta, GA	City of Mauldin, SC	Frederick County, MD
City of Farmers Branch, TX	City of Atlanta, GA	City of Folly Beach, SC	City of Seaford, DE
City of Fredericksburg, TX	City of Brookhaven, GA	Town of Hilton Head Island, SC	City of Milford, DE
City of Lockhart, TX	City of Chamblee, GA	Dillon County, SC	<b>City of Rochester, MN</b>
City of Pflugerville, TX	City of Dahlonega, GA	Beaufort County, SC	<b>City of Minneapolis, MN</b>
City of Rowlett, TX	City of Douglasville, GA	Berkeley County, SC	City of Kalamazoo, MI
City of Sachse, TX	City of Dunwoody, GA	Charleston County, SC	Genesee County, MI
City of Seguin, TX	City of Fayetteville, GA	Dorchester County, SC	City of Pittsburgh, PA
City of Portland, TX	City of Garden City, GA	Laurens County, SC	County of Montgomery, PA
City of Del Rio, TX	City of Jackson, GA	Pickens County, SC	Livingston County, NY
Brazoria County, TX	City of Marietta, GA	York County, SC	Genesee County, NY
Denton County, TX	City of Norcross, GA	Town of Chapel Hill, NC	City of Portsmouth, NH
Fort Bend County, TX	City of Roswell, GA	City of High Point, NC	City of Manchester, NH
Hood County, TX	City of Sandy Springs, GA	City of Burlington, NC	City of Norwalk, CT
Kaufman County, TX	City of Savannah, GA	City of Raleigh, NC	Town of Wethersfield, CT
Randall County, TX	City of Statesboro, GA	City of Hendersonville, NC	Town of Plainville, CT
Matagorda County, TX	City of South Fulton, GA	City of Rocky Mount, NC	Town of Colchester, VT
City of Broken Arrow, OK	City of Suwanee, GA	City of Southport, NC	City of Cambridge, MA
City of Hot Springs, AR	City of Tybee Island, GA	Rowan County, NC	Town of Bridgewater, MA
City of Salina, KS	DeKalb County, GA	Buncombe County, NC	City of Portland, ME



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## 1.2 Select Relevant Experience

Because Evergreen has conducted more than 1,500 projects that are similar in scope to the services being requested by the City of Lakeville, we have included in this section only a sample of some of our similar local government work.

### **Compensation and Classification Study City of Minneapolis, Minnesota**

Evergreen was retained by the City of Minneapolis - Public Works Department to conduct a Compensation and Classification Study for Engineering Titles. Evergreen's analysis addressed the following: effectiveness of the current classification titles and salary structure; pay equity for comparable classification titles located both individually and organizationally across multiple Public Works divisions specifically analyzing each position's job description, title, and pay; competitiveness of current salary ranges to other comparable public and private employers in the region; identification of essential job functions; FLSA designations; and mapping career growth based on vertical, lateral and cross-functional roles.



### **Review of Classification and Compensation System City of Rochester, Minnesota**

Evergreen was hired by the City of Rochester to review the City's Classification and Compensation System. The scope of work will consist of reviewing the current compensation philosophy, policy and system, recommending a new job evaluation system, reviewing exempt and non-exempt position designations under FLSA guidelines, performing a compression analysis to identify individual or group pay compression issues and providing potential solutions, performing system testing to assure MN Pay Equity Compliance, and presenting options and recommendations for a classification and compensation plan. **Note:** This project is nearing completion.



### **Total Compensation Study Genesee County, Michigan**

Evergreen Solutions was retained by Genesee County to conduct a Total Compensation Study. Evergreen performed the following tasks: established appropriate benchmarking standards and conducted salary surveys for similar positions with comparable municipalities and private employers within the same geographic area as required; developed and conducted a comprehensive compensation and benefits survey; analyzed and recommended any changes to the current fringe benefits, wages, and salary structures in order to become or remain competitive with comparable



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municipalities and private employers within the same geographic area; and provided an estimate of future adjustments, in the next 1-3 years, to maintain a competitive position with other comparable municipalities and private employers within the same geographic area.



**Classification and Compensation Study  
City of Moline, Illinois**

Evergreen Solutions was retained by the City of Moline to conduct a Classification and Compensation Study. The objectives of the study were to: develop a new classification plan to provide consistency in the administration of the personnel system; ensure job descriptions accurately reflect the duties and responsibilities of the positions; review exempt status as defined by the Fair Labor Standards Act (FLSA) for certain positions; provide a compensation plan that assures proper internal relationships among classes; and provide recommendations concerning salary levels reasonably comparable to the Quad Cities area pay levels of major public employers.



**Classification and Compensation Study Services  
City of Urbana, Illinois**

Evergreen Solutions was engaged with the City of Urbana to provide Classification and Compensation Study Services. The City of Urbana had sought to achieve the following goals:

- maintain a high level of employee satisfaction by providing a classification and compensation system that is both fair and competitive;
- demonstrate fiscal responsibility to the community by providing a classification and compensation system that makes the best of The City's financial resources; and
- ensure a close alignment between pay and performance by providing a classification and compensation system that rewards merit.



**Compensation Study and Analysis  
McLean County, Illinois**

Evergreen Solutions was engaged with McLean County to conduct a Compensation Study and Analysis. Evergreen's consultants performed a comprehensive, valid and reliable job analysis/evaluation of each job class within the County to determine if the current pay grade levels for all classified and appointed positions were still appropriate and conducted a comprehensive wage and benefits survey(s) for the purpose of ensuring that the County pay plans/pay structures and benefits possess external equity



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and labor market competitiveness. In the end, Evergreen developed a maintenance program to address the need for new job analysis/evaluation (including pay grade recommendation), creation of new job description(s), and the continued maintenance of the Pay Classification Plans.



**Salary and Benefits Study  
City of Bloomington, Indiana**

Evergreen Solutions was retained by the City of Bloomington to conduct a Salary and Benefits Study. Evergreen examined the wages and benefits of the City's employees (including transit) as compared to public and private sector entities in Indiana and surrounding areas to determine whether the City's wages and benefits were competitive in the market.



**Compensation Study  
City of Winchester, Kentucky**

Evergreen Solutions was retained by the City of Winchester to conduct a Compensation Study. Evergreen conducted a market analysis of the City positions with comparable and surrounding jurisdictions to determine the City's overall market position.



**Compensation and Classification Consulting Services  
City of Clarksville, Tennessee**

Evergreen Solutions was engaged with the City of Clarksville to provide Compensation and Classification Consulting Services for more than 1,450 employees. Evergreen reviewed the City's current compensation plan, gathered necessary salary data from comparable organizations within a 200-mile radius. Evergreen also evaluated the City's current classification positions, gathered necessary employee information using a combination of job analysis questionnaires as well as supervisor and employee interviews to determine whether individuals were appropriately classified. Evergreen further updated job descriptions and made FLSA determinations.



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**Classification and Compensation Study Services  
City of Murfreesboro, Tennessee**

Evergreen Solutions was engaged with the City of Murfreesboro to provide Classification and Compensation Study Services. Evergreen conducted a compensation survey by identifying comparable organizations and competitive labor markets for selected position classifications and evaluated the pay structure relative to current labor market conditions to assure the City remains competitive for hiring at various grade levels of employment, including compensation analysis and reporting based on similarly situated employees, similar skills, qualifications, responsibilities, and pay, using job family groupings and EEO job categories that comport with EEOC guidelines for government employers.



**Compensation Study  
City of White House, Tennessee**

Evergreen Solutions was retained by the City of White House to conduct a Compensation Study. Evergreen reviewed Total Compensation (compensation and benefits) for City employees and provided recommendations of possible wage adjustments that would align with the City's compensation philosophy. Evergreen provided a valid analysis of where the City of White House stood relative to peer municipalities regarding compensation of employees in both base pay and total compensation packages.



**Compensation Study  
City of Morristown, Tennessee**

Evergreen Solutions was retained by the City of Morristown to conduct a Compensation Study. Evergreen's consultants examined employee wages and benefits to assess the competitiveness of the existing compensation and benefits system and to consider the functionality of the current system. Evergreen worked with the administration to establish and prescribe any necessary adjustments to the classification and compensation pay plan and provided related strategies for implementation.



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### **Classification and Compensation Study City of Cleveland, Tennessee**

Evergreen was hired by the City of Cleveland to conduct a Classification and Compensation Study. The goals of the study are to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic areas.



### **Employee Classification and Compensation Study Blount County, Tennessee**

Evergreen Solutions was retained by Blount County to conduct an Employee Classification and Compensation Study for its workforce. Evergreen conducted focus groups and interviews with employees and employees completed a Job Assessment Tool (JAT) that identified work performed. Evergreen presented to the Human Resources Director and Mayor any resultant classifications recommended in the classification study and provided for the maintenance of the new structure, including periodic review, reclassification review procedure and promotion guidelines.

For the compensation study, Evergreen identified survey labor market and benchmark classes to use for a market analysis; conducted a comprehensive compensation search utilizing other similar public sector employers; completed internal salary relationship analysis, including the development of appropriate internal relationship guidelines; developed externally competitive and internally equitable salary recommendations for each class included within the study in order to maintain appropriate competitive position in relation to other employers within the region; and assigned a salary range to each classification which reflected the results of the market survey and the analysis of internal relationships. Evergreen presented survey results to management to make a decision on overall pay philosophy. In the end, Evergreen recommended appropriate premium pay options to supplement the compensation plan. Examples included options for pay for certifications, professional licenses, special skills, temporary “acting” assignment at higher level duties, “on-call” and “callout” pay, pay alternatives for exempt level workers not normally eligible for overtime, and similar pay practices. **Note:** Evergreen Solutions was again retained by the County to conduct a Compensation Plan Update.



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### **Comprehensive Classification and Compensation Study City of Branson, Missouri**

The City of Branson hired Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to determine whether the City possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Branson.



### **Compensation Study City of Lee's Summit, Missouri**

The City of Lee's Summit retained Evergreen Solutions to conduct a Compensation Study to determine whether the City possessed a compensation and classification system that was equitable as compared to both the external competitive employment market as well as being internally equitable. The study included a complete classification analysis using the Job Assessment Tool and Management Issues Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including both benefits and salary surveys of competing organizations.

The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing systems in place at the City of Lee's Summit. Also included in this study was an evaluation of the City's performance evaluation system to include recommendations for improvement, revision of evaluation instruments and development of a brief training manual for the program.



### **Compensation and Benefits Study City of Dardenne Prairie, Missouri**

Evergreen Solutions was retained by the City of Dardenne Prairie to conduct a Compensation and Benefits Study. Evergreen reviewed the City's existing compensation and benefit plan, gathered necessary survey data from comparable municipalities in the St. Louis Metropolitan Area using a customized survey and recommended appropriate pay ranges for all positions (i.e., appropriate spread between minimum and maximum pay ranges and distance between steps, where appropriate). Evergreen further reviewed current job descriptions and titles and rewrote job descriptions to coincide with current responsibilities for each employee. Lastly, Evergreen provided the City with an Administration Manual with plan maintenance procedures. **Note:** Evergreen was again hired in 2025 to conduct a Classification and Compensation Plan update.



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### **Comprehensive Compensation Study City of Troy, Missouri**

Evergreen Solutions was engaged with the City of Troy to conduct a Comprehensive Compensation Study. Evergreen performed the following tasks:

- identified criteria that was used in selecting comparable entities. For example, entities with similar population, similar geography, a similar mix of residential and commercial properties, and similar work force;
- identified the process to normalize the data to adjust for differences in city population, size, or other differences from Troy;
- developed pay/productivity ratios for each City department that demonstrated how much salary was paid on average by each city for certain levels of service;
- performed a job analysis for each position and conducted interviews with employees;
- reviewed all job descriptions and created updated descriptions as needed;
- performed an organization-wide operational efficiency study and identified staffing levels that deviated significantly from that of comparable entities.
- performed a market salary survey to determine competitive salary levels for all positions;
- performed survey of market to compare the type of fringe benefits provided to comparable entity employees that included, but were not limited to, health insurance, dental, vision, life, vacation, sick leave, annual holidays, education reimbursement, training and work hours;
- updated the present salary schedule; and
- recommended compensation policy regarding salary caps.



### **Compensation Study and Pay Equity Analysis City of Fulton, Missouri**

Evergreen Solutions was retained by the City of Fulton to conduct a Compensation Study and Staff Review that also included a comparison of benefit offerings in the market. Evergreen evaluated employee compensation and right-size staffing in terms of comparability and competitiveness, both from an internal equity and market perspective for similar municipalities and positions in the region. Evergreen also conducted a gender/race equal-pay analysis and provided recommended pay structures.



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**Compensation Study  
City of Jefferson, Missouri**

Evergreen Solutions was engaged with the City of Jefferson to conduct a Compensation Study. The primary focus area for this project to correct salary compression where it existed and external market benchmarking/ analysis in order to update the City's compensation plan to make it more competitive. Evergreen's consultants analyzed the effectiveness of the existing salary structure and recommend changes, if needed, based on best practices for municipal organizations within the market.



**Employee Classification and Compensation Study  
City of St. Louis, Missouri**

Evergreen was hired by the City of St. Louis to conduct an Employee Classification and Compensation Study. Evergreen will conduct a comprehensive evaluation and analysis of all 6,700 jobs within the City to determine relative value within the organization; evaluate all current job classifications; conduct internal salary relationship analysis and make appropriate recommendations; identify and recommend a relevant salary survey benchmark; identify potential pay compression issues and solutions; and provide a maintenance strategy to maintain. **Note:** This project is nearing completion.



**Comprehensive Compensation and Classification Study  
Jefferson County, Missouri**

Jefferson County retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to analyze the County's market competitiveness and internal equity. Located just 40 miles southwest of the City of St. Louis, the County possessed a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments required special effort. With this in mind, this study included a comprehensive classification analysis using the Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County.



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**Classification and Compensation Study  
St. Charles County, Missouri**

Evergreen Solutions was engaged with the St. Charles County Government to conduct a Classification and Compensation Study for its 1,650 employees. The primary purpose of the study was to assist the County in the evaluation of its overall employee compensation and pay structure as compared to the market; to perform a job audit and analysis for each full-time position to determine appropriate classification; and to update/develop job descriptions in a standardized format that is ADA and FLSA compliant. At the conclusion of the study, Evergreen provided a recommended job evaluation plan that will allow the County to evaluate positions every two years as well as provided an administration manual with plan maintenance procedures and a summary document that could be used to communicate the compensation system change to current and future employees.



**Classification and Compensation Study  
Jackson County, Missouri**

Evergreen was retained by Jackson County to conduct a Classification and Compensation Study for more than 1,800 employees. Evergreen performed a job and analysis to ensure employee's duties and responsibilities were accurate. Evergreen updated job descriptions, reviewed the County's compensation structure, and provided recommendations to optimize the attraction and retention of employees. In the end, Evergreen prepared a report with findings and recommendations to improve the current classification and compensation system.



**Classification and Compensation Study  
Jasper County, Missouri**

Evergreen Solutions was retained by Jasper County to conduct a Classification and Compensation Study. Evergreen performed the following tasks:

- conducted a review and update of the County's compensation (including benefits) of appropriate and comparable employers within the relevant "benchmark" data;
- identified inconsistencies and deficiencies within the current compensation and classification, provided written recommendations for their resolution, and developed a plan for the implementation of the recommendations which included the cost of implementation and the effect on employees;
- identified survey labor market and benchmark county/classes and established appropriate "benchmarking" standards and conducted a salary survey;



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- recommended changes to existing salary range structures, including the establishment and/or modification of salary range tables and benefits;
  - recommended and set forth a transition plan for the implementation of the compensation and classification plan;
  - reviewed and analyzed internal position structures, made up of incumbent classifications and re-classifications and verified the accuracy of existing job descriptions to the duties, tasks, responsibilities and qualification requirements for each position, including the development of appropriate internal relationship guidelines;
  - ensured all descriptions include contents met current legal requirements or recommendations;
  - provided a plan for maintenance and updating of the compensation plan.



#### **Comprehensive Pay Plan/Compensation Review City of Salina, Kansas**

Evergreen Solutions was engaged with the City of Salina to conduct a Comprehensive Pay Plan/Compensation Review. Evergreen performed an extensive compensation review that compared the City of Salina's positions with comparable positions of other local government entities, including other Kansas cities of comparable size; and, where applicable, comparable public and private sector positions in the competitive market area. A review of internal equity was also conducted and job descriptions were updated, as needed. Evergreen also conducted a gender/race equity study and provided recommendations on to the City on how to make the compensation structure more equitable.



#### **Classification and Compensation Study City of Leawood, Kansas**

Evergreen Solutions was retained by the City of Leawood to conduct a Classification and Compensation Study. Evergreen performed a review of the existing classification plan and related job descriptions and conducted a salary study to include public and private employers who provide comparable services. In the end, Evergreen prepared recommendations for compensation policies, including but not limited to: cost of living and merit pay increases, career ladders and variable incentive pay options to maintain competitiveness, reward employees, and to ensure internal pay equity. Note: Evergreen was again hired in 2025 to conduct a salary study.



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### **Comprehensive Compensation Study Shawnee County, Kansas**

Evergreen Solutions was engaged with Shawnee County to conduct a Comprehensive Compensation Study. Evergreen conducted an external competitive market study for all current County positions to measure County pay versus market rates for each position. Evergreen further prepared cost proposals and alternatives for establishing market pay rates for each position within three years following completion of the study and provided training to Department Heads and Human Resource Director in plan implementation and maintenance as needed.



### **Classification and Compensation Study Sedgwick County, Kansas**

Evergreen Solutions was retained by Sedgwick County to conduct classification and compensation study for approximately 2,766 employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity within the County and a plan was provided to address maintenance of implemented changes to the County's classification and compensation system. In addition, Evergreen provided County staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system would be accomplished. **Note:** Evergreen was again retained in 2022 to conduct a Classification and Compensation Plan Update.



### **Classification and Compensation Study and Analysis City of Broken Arrow, Oklahoma**

Evergreen Solutions was retained by the City of Broken Arrow to conduct a Classification and Compensation Study and Analysis to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. Evergreen performed the following: reviewed all current job classifications, confirmed and recommended changes to hierarchical order of jobs using The City's evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers); identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation matrix and/or structure to meet the market analysis; and assessed potential impact of pending DOL changes.



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**Employee Compensation and Classification Study  
Mahoning County, Ohio**

Evergreen Solutions was retained by Mahoning County to conduct an Employee Compensation and Classification Study for all the County's 1,746 employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were further analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen's consultants also reviewed and updated existing job descriptions and determined FLSA designations for each job title/classification. Evergreen designed an implementation strategy for the compensation system with the lowest financial impact on the County's operating budget and with the greatest gain to positions that fell outside of a designated range. In the end, recommendations were made to improve the fairness and equity in the current system.



**Compensation Study  
Montgomery County, Pennsylvania**

Evergreen Solutions was retained by Montgomery County to conduct a Compensation Study. The study included an examination of the County's compensation plan in order to provide recommendations for compensation policies, procedures and practices which covered 3,100 full-time employees. and allowed the County to be competitive in the marketplace for attracting and retaining qualified employees. Evergreen recommended and identified a market position for the County by administering a comprehensive labor market salary survey to select public and private sector peers. Evergreen also conducted a comparative analysis of benefits provided in the market that included PTO, health, dental, vision and prescription, including percentage of contribution between employee and employer, long term disability (LTD), life insurance and pension benefits. Evergreen then recommended appropriate salary ranges (i.e., min, mid, and max) for all non-represented classifications. Evergreen prepared a cost analysis for the recommended salary ranges



**Gender Disparity Study  
City of Pittsburgh, Pennsylvania**

Evergreen Solutions was on contract with the City of Pittsburgh to conduct a Gender Disparity Study to evaluate the relative fairness and internal equity of the classification and compensation system for its more than 3,400 employees. The study included a review of the current system specifically focusing on an: analysis of the existing position/job analysis tools; analysis of the classification process and issues of internal pay equity; and analysis the reliability of the current job classification rating system in producing equitable classification and pay relationships among all employees regardless of gender or other bias.



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**Compensation and Classification Review  
City of Cambridge, Massachusetts**

Evergreen was hired by the City of Cambridge to conduct a Compensation and Classification Review for its 3,000 employees. The goals of this study were to: identify and mitigate pay equity disparities; attract and retain highly qualified employees; ensure salaries are commensurate with the responsibilities assigned; facilitate recognizable growth; establish justifiable pay differentials between individual roles; and maintain a competitive standing to the City's competitors and surrounding areas. Evergreen will analyze the city's compensation plan to identify recruitment and retention challenges; recommend a competitive market position for the city; prepare recommendation and impact analysis for positions above the maximum salary grade and step following reclassification; and provide staff training to maintain and revise the system as needed.



**Classification and Compensation Study and Analysis  
Town of Bridgewater, Massachusetts**

Evergreen Solutions was retained by the Town of Bridgewater to conduct a Classification and Compensation Study and Analysis. The purpose of study was to address changes in Town operations and staffing over the past several years, which might have affected the type, scope, and level of work being performed and to also address Police and Fire compensation that took into account the various benefits.

The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, authority, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same general geographic areas.



**Compensation Study  
City of Portsmouth, New Hampshire**

Evergreen Solutions was retained by the City of Portsmouth to conduct a Compensation Study. Evergreen evaluated employee compensation in terms of comparability and competitiveness from a market perspective with similar municipalities and positions in the region and provided recommendations to assist the City in recruiting and retaining a quality workforce.



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**Classification and Total Compensation Review  
City of Manchester, New Hampshire**

Evergreen Solutions was retained by the City of Manchester to conduct a Classification and Total Compensation Review of 1,200 employees. Evergreen performed the following tasks in order to achieve the City's goals: conducted a job analysis, updated, and evaluated comprehensive wage, benefits, and PTO market survey and comparisons; developed a compensation philosophy and communication plan; revised performance assessment and evaluation system; provided tools and training; and provided recommendations and reports.



**Job Classification and Compensation Study  
Town of Wethersfield, Connecticut**

Evergreen Solutions was retained by the Town of Wethersfield to conduct a Job Classification and Compensation Study. The objectives of the study were to conduct a total compensation plan structure which will provide both internal and external equity, to establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, to determine and implement a program of accurate job descriptions based on job analysis, and to develop a maintenance program for job descriptions and classification recommendations.



**Classification and Total Compensation Study  
Town of Plainville, Connecticut**

Evergreen was hired by the Town of Plainville to conduct a Classification and Total Compensation Study. Evergreen reviewed the current classification grade methodology and proposed recommended strategies for addressing issues with the Town; conducted a compression analysis; identified career ladders and promotional opportunities; recommended a classification structure based on finding from the job evaluation process; recommended an appropriate salary range for each position based on finding from a market salary survey; identified any extreme current individual or group inequalities and provided a recommended corrective action plan and process to remedy those; and provided implementation strategies.



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**Compensation Consultation Services  
Genesee County, New York**

Evergreen was retained by Genesee County to provide Compensation Consultation Services for all full-time positions in the public sector. Evergreen provided recommendations to address any anomalies within current pay structures. Evergreen also performed the following tasks: conducted a survey of salaries; conducted interviews and/or job audits with employees; provided recommended salary ranges for each position; provided a recommended strategy for implementing any changes to the pay plan; and provided training for County HR staff to enable them to effectively use and maintain the market competitiveness.



**Employee Compensation Study  
Livingston County, New York**

Evergreen was hired by Livingston County to conduct an Employee Compensation Study. The scope of work will consist of reviewing the County's job specifications and organizational structure; performing a market salary survey of private and public-sector benchmarks; identifying a set of comparable municipal organizations and gathering relevant compensation and benefit data; identifying critical obstacles to public-sector recruitment strategies; including any specific challenges for the County; providing a compensation plan and salary schedule based on the market survey results; reviewing existing staff compensation to determine inequities in pay and making recommendations; completing an internal salary-relationship analysis, including the development of appropriate internal equity; reviewing the County's benefits offerings and advising on additional recruitment and retention barriers; preparing an analysis of the financial impact of implementing any recommendations; and presenting the final report to the public and the County Board of Supervisors. **Note:** This project is nearing completion.



**Compensation Study  
City of Seaford, Delaware**

Evergreen was hired by the City of Seaford to conduct a Compensation Study. The primary objectives of the study were to: attract and retain qualified workers; provide market rate salaries to all workers; enable the City to maintain a competitive position with other comparable municipalities and private companies within the same geographical area; and establish practices and policies to continue to meet the objectives in future years. In the end, Evergreen updated the City's current classification titles, job titles, and compensation plan for the City.



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**Classification and Compensation Study  
City of Milford, Delaware**

Evergreen was hired by the City of Milford to conduct a Classification and Compensation Study. Evergreen conducted a job analysis as well as an market salary to ensure internal and external equity. **Note:** Evergreen was previously hired by the City in 2021 to conduct a Job Classification and Compensation Study.



**Classification and Compensation Study Services  
City of Westminster, Maryland**

Evergreen Solutions was retained by the City of Westminster to provide Classification and Compensation Study Services. The scope of work included the review and updating of the City's current job descriptions as well as providing technical assistance in the development of a comprehensive performance evaluation system to integrate with the new classification system. The primary objectives for this study was to:

- develop a formal compensation philosophy for adoption by the Mayor and Common Council;
- identify comparable benchmark employers to guide the City's future employee salary and benefit decisions to facilitate the attraction and retention of high-performance staff members, while being financially sustainable;
- establish a comprehensive job classification system using the approved job evaluation system that accommodates the City's needs for an internally and externally equitable, defensible, market sensitive, and easily administered system for all current and future positions within the City;
- train Human Resources staff to apply the adopted compensation philosophy to maintain the adopted classification and compensation system; and
- provide legally defensible classification specifications (ADA, FLSA, and any other applicable federal and state laws).

**Note:** Evergreen was again hired in early 2021 to conduct a Compensation Plan update.



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**Salary and Benefits Review, and Analysis  
City of Hyattsville, Maryland**

Evergreen Solutions was hired by the City of Hyattsville to conduct a Salary and Benefits Review and Analysis of all classifications. The process included a comprehensive review of market compensation averages using a detailed duties-based salary survey approach as well as a comprehensive benefits survey. Market position was determined, a compensation philosophy was developed and strategic positioning recommendations were made with the goal of providing the City a more equitable compensation model. **Note:** Evergreen was again hired in 2016 to conduct a Compensation System Analysis for the City. Evergreen also conducted a Compensation Plan Update for the City in 2023.



**Classification and Compensation Study  
City of Laurel, Maryland**

Evergreen was retained by the City of Laurel to conduct a Classification and Compensation Study. The scope of work included: defining a process for updating job description content; updating and/or creating new job descriptions for each classification ensuring that they meet all required legal standards, especially Equal Employment Opportunity and Americans with Disabilities Act (identification of essential job duties); determining the exempt or non-exempt status of each position, pursuant to the Federal Labor Standards Act; conducting a full market analysis of the classification and compensation structure for all City positions; recommending improvements to the current classification and compensation system or proposing a new system based on results from the market analysis that meet the requirements of the law, assures internal equity and external competitiveness, has the ability to be coordinated with current labor agreements, incorporates market conditions identified in the study, and standardizes and reduces the number of classifications in the City, if necessary or appropriate; reviewing the City's current merit program and providing a detailed assessment and any recommended adjustments; developing an implementation plan that includes senior staff management, employee, and union representation communication regarding results of the study and individual position classification and compensation assignments; and providing training on the use and maintenance of the system.



**Classification and Compensation Plan Review  
City of Annapolis, Maryland**

Evergreen Solutions was engaged with the City of Annapolis to conduct a Classification and Compensation Plan Review. The primary objectives of the study were to: review and revise the current classification system; review and revise job descriptions; determine relevant competitive markets by conducting a salary survey of selected peer organizations; propose guidelines for an improved or new compensation program; and provide recommendations to keep the current pay structure competitive.



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**Compensation Study  
City of Hagerstown, Maryland**

Evergreen Solutions was retained by the City of Hagerstown to conduct a Compensation Study. Evergreen's consultants worked with the City to evaluate what type of pay plan would reinforce current and future goals. Evergreen identified external targets for surveying select positions. After conducting the market salary survey, Evergreen produced a pay plan for employees that best met the needs of the City and included the number of grade, steps, and ranges as well as recommendations for continued administration of the compensation system.



**Job Classification and Compensation Study  
City of Baltimore, Maryland**

Evergreen Solutions was engaged with the City of Baltimore to conduct a Job Classification and Compensation Study. Evergreen conducted a total compensation survey using both private and public companies, using not only job titles, but duties and responsibilities based upon classification specifications for the seven existing classifications (i.e., Engineers, Nurses, Public Health Representative, Forensic Scientist, Safety Enforcement Officers) from the City. Based on the results, Evergreen determined the most appropriate market pay for each position in consideration of the City's compensation practices/philosophy. Evergreen further completed an internal base salary relationship analysis, including the development of appropriate internal relationship and equity guidelines, developed external competitive and internal equitable salary recommendations for each classification included within the study, and prepared and recommend a salary range to each classification which reflected the results of the market survey and the analysis of the internal relationships to include impact analysis.

Note: Evergreen was again hired in both 2022 and 2023 to conduct a Compensation Study.



**Wages and Salary Scale Study  
Washington County, Maryland**

Evergreen Solutions was retained by Washington County to conduct a comprehensive study of the County's wages as they related to neighboring jurisdiction's wages and salaries, the purpose of which was to assure adequacy of pay and employee wages when compared to area private and public employees. Evergreen met with each Division Director to gather information regarding pay issues that were unique to their departments. Evergreen conducted a brief review of the method of classifying positions to ensure its adequacy in today's pay and classification environment. Using the current or revised classification system, Evergreen evaluated all positions and placed them in an appropriate "grade". Evergreen recommended a system the County could use in the years to come to evaluate job positions.



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**Compensation Study  
Allegany County, Maryland**

Evergreen Solutions was engaged with Allegany County to conduct a Compensation and Classification Study. The County was looking for an overall review and recommendations on its current compensation and classifications. To accomplish this, Evergreen conducted: a market and compression analysis; a classification structure review; and a performance evaluation study. Evergreen then provided merit system recommendations.

**Note:** Evergreen previously worked with the County to conduct a Comprehensive Compensation Study and analysis for the Office of the Sheriff.



**Classification and Compensation Study  
Frederick County, Maryland**

Frederick County has retained Evergreen Solutions to conduct a Classification and Compensation Study for the County's 2,950 employees. Evergreen will conduct a job analysis to determine internal equity within the County and update job descriptions based on findings from the analysis. Evergreen will also conduct a salary survey by comparing the County's positions to the market in order to provide recommendations to the County to make salaries more competitive for recruitment and retention purposes.

**Note:** This project is nearing completion.



**Classification and Compensation Study  
Prince George's County, Maryland**

Evergreen Solutions was retained by Prince George's County to conduct a Classification and Compensation Study for approximately 7,000 employees. Evergreen performed the following tasks: conducted a job analysis to establish and/or redefine grades, classifications groups, and job relationships; identified benchmark jobs from each grade/classification to survey in the market; determined a relevant job market; conducted a customized market salary survey; performed survey data analysis and recommended appropriate pay structures; provided a cost analysis of all recommendations; and presented a final report to the County. Evergreen also provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



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**Classification Study  
Talbot County, Maryland**

Evergreen was retained by Talbot County to conduct a Classification Study. Evergreen conducted a job analysis to determine the appropriate hierarchy of jobs within the County and updated job descriptions as needed. **Note:** Evergreen was again hired in 2024 to provide Job Performance Tracker and Competency Building to the County.



**Classification and Compensation Study  
Garrett County, Maryland**

Evergreen was retained by Garrett County to conduct a Classification and Compensation Study. Evergreen conducted a preliminary assessment of the County's existing compensation plan as well as collected and reviewed current environmental data within the County. Evergreen then evaluated and built a projected classification plan, followed by collecting market salary survey data. Strategic positioning recommendations were made prior to formulations of the solution analysis. A final report was presented to the County with recommendations to update the compensation and classification plans along with implementation strategies.



**Compensation and Classification Study  
Charles County, Maryland**

Evergreen Solutions was engaged with Charles County Government, Maryland to conduct a Compensation and Classification Study. The purpose of the study was to review the classification and compensation system; conduct a compression analysis and prepare a compensation philosophy; conduct a market analysis; prepare a new pay plan; and provide recommendations for pay incentives, supplements, and policies.



**Compensation Study  
Town of Ocean City, Maryland**

Evergreen Solutions was engaged with the Town of Ocean City to conduct a Compensation Study. Evergreen conducted an analysis of pay against the market and prepared a summary report of the survey results in order to make recommendations for updating the Town's pay plan.



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**Classification and Compensation Study  
City of Falls Church, Virginia**

Evergreen Solutions was engaged with the City of Falls Church to conduct a Classification and Compensation Study. Evergreen's consultants evaluated the City's present classification system and compensation structure as it compared to the local and regional job market for comparable public sector employers, municipalities and local market competitors. In addition, Evergreen evaluated all positions to determine the relative worth in the City for internal equity and establish pay ranges and progression within the ranges. Evergreen further conducted an analysis of gender pay equity and provided recommendations to the City.



**Pay and Classification Study  
City of Williamsburg, Virginia**

Evergreen Solutions was retained by the City of Williamsburg to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the marketplace to determine the appropriate pay levels for all jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



**Classification and Compensation Study  
City of Fredericksburg, Virginia**

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Classification and Compensation Study. Evergreen conducted a full job analysis of City positions and revised, if necessary, existing job descriptions based upon the findings of the job analysis. Evergreen also surveyed the local labor market to ensure that the City's overall package of compensation and benefits was competitive and evaluated whether the City's current human resources policies were affecting the City's ability to compete in the labor marketplace. Evergreen assisted the City in updating its current classification and compensation plan and developing a strategy to increase employees' pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations to the overall classification and compensation plan that provided internal equity and that was competitive in the marketplace to attract and retain qualified employees.

Evergreen Solutions was engaged with the City of Norfolk to conduct a Classification and Compensation Study. Evergreen conducted a job analysis to determine internal equity as well as an external labor market analysis to determine whether the City was competitive with its peers.



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**Classification and Compensation Study  
City of Norfolk, Virginia**

Evergreen Solutions was hired by the City Norfolk to conduct a Compensation Study. Evergreen will review existing compensation plans and understand current challenges in recruiting and retaining employees; provide the City with a review of benchmark cities' compensation policies; propose a comprehensive plan; recommend appropriate placement of each existing position on the proposed step plan; complete a compression analysis and provide recommendations; and recommend implementation strategies. The City of Norfolk had 5,000 employees at the time of the study. **Note:** Evergreen was previously hired in 2022 to provide Consulting Services for Compensation Program Transition.



**Consulting Services for Compensation Program Transition  
City of Newport News, Virginia**

Evergreen Solutions is retained by the City of Newport News to provide Consulting Services for Compensation Program Transition. Evergreen will carry out a feasibility study, entailing an assessment/evaluation of the City's current compensation program/pay structure (traditional salary ranges) and the viability/practicability of the City's transition from its current pay structure to a broadband pay structure, or multiple structures for specific work groups. **Note:** Evergreen previously conducted a job comparability study for the City and the Newport News Sheriff's Office.



**Classification and Compensation Study  
City of Hopewell, Virginia**

Evergreen was hired by the City of Hopewell to conduct a Classification and Compensation Study. Evergreen will perform the following tasks: review current classification grade methodology and propose recommended strategies for the City; update and/or create ADA compliant job descriptions; compare position description questionnaires to existing job descriptions; analyze existing internal hierarchy based on job relationships, identify problem areas within the internal hierarchy system, and propose implementation methods to correct identified problems; recommend appropriate salary range for each existing or proposed position; recommend implementation strategies; and conduct a compression analysis.



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### **Comprehensive Classification and Compensation Study Isle of Wight County, Virginia**

Evergreen Solutions was again engaged with Isle of Wight County to conduct a Comprehensive Classification and Compensation Study which assisted the County in updating its classification plan, revising salary administration guidelines, and developing a compensation philosophy within the competitive labor market. The study also evaluated the County's internal equity (compression) as well as the current classification and salary structures as compared to the job market for comparable positions in other municipalities, and in the private sector when appropriate.

The County's objectives for the study were to: attract and retain highly qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and required knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth (e.g., Career Development Program for non-sworn employees); provide justifiable pay differential between job classifications; maintain a competitive market position with other comparable government entities and private employers (as applicable) within the same geographic areas; address pay compression and equity issues; and recommend additional pay incentives and supplements that can be considered to remain competitive in the market. **Note:** Evergreen previously conducted a similar study for the County and was again hired in 2025 to conduct a Classification and Compensation Plan Update.



### **HR Market Study Botetourt County, Virginia**

Evergreen Solutions was retained by Botetourt County to conduct an HR Market Study. Evergreen determined the salary range of profiled entities compared to the County for each covered position's minimum, midpoint and maximum; examined the existing employee average salary of profiled entities compared to each County's positions; determined the County's market position for each position individually and overall; and reviewed EEO category and exempt status for all 25 positions; and provided a recommendation for needed revisions to the County's pay plan



### **Job Analysis Prince William County, Virginia**

Evergreen Solutions was retained by Prince William County to conduct a Job Analysis of one position. Evergreen used a Job Assessment Tool to analyze the position and determine the proper placement with the current pay plan.



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**Classification and Compensation Study  
County of Culpeper, Virginia**

Evergreen was retained by Culpeper County to conduct a Classification and Compensation Study. The objectives of the study included the following: attract and retain qualified employees; ensure that positions performing similar work with essentially the same level of complexity and responsibility are classified together; ensure that salaries are commensurate with assigned duties; provide options for compensation growth; provide equitable salaries for all employees of the County; and, provide the County with a salary structure that enables the County to maintain a competitive position with other Counties within the same geographic area. **Note:** Evergreen previously conducted a similar study for the County.



**Classification and Compensation Study (Phase I)  
Loudoun County, Virginia**

Evergreen Solutions was engaged with Loudoun County to conduct a Classification and Compensation Study. Evergreen conducted a comprehensive review and evaluation of the County's compensation philosophy and competitive market and made recommendations to retain, modify and/or change the compensation philosophy and/or competitive market. Evergreen also conducted a comprehensive review and evaluation of policies governing the County's total compensation program (pay and benefits offerings) and classification system; benchmarked the elements of the County's total compensation and classification program against its current competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify and/or change elements of the total compensation and classification program. Evergreen further conducted a comprehensive review and an evaluation of the County's performance plan system; benchmarked the County's system against the job description systems of its competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify, or change the current system. In the end, Evergreen provided comprehensive recommendations for modifying classification and compensation policies and procedures.



**Classification and Compensation Study (Phase II)  
Loudoun County, Virginia**

Evergreen Solutions was again hired by Loudoun County to conduct a Classification and Compensation Study (Phase II) for more than 3,500 employees. Evergreen accomplished the objectives of the Phase II of the study by performing the following tasks:



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- developed recommendations on a strategy to implement and administer a compensation philosophy range of 95 percent to 105 percent of the comparator market.
  - conducted a comprehensive benchmark market analysis of all County jobs.
  - developed a new market competitive pay plan to include an open range pay plan for the general workforce and a “grade and step” pay plan for Public Safety positions.
  - provided recommendations for any additional pay incentives and supplements that assisted in maintaining competitive pay as described in Loudoun’s compensation philosophy.
  - reached out to peers for information relating to pay grades, pay policies, and benefits information.
  - developed a new comprehensive classification system that allows for more levels and specificity within and across each job group, to include the development of standardized job descriptions.
  - obtained an analysis of pay compression within the County and recommendations for addressing pay compression once a new pay plan was implemented; and
  - developed recommendations for revisions to the Board approved classification and compensation policies found in Chapter 5 of the Human Resources Handbook.



### **Classification and Compensation Study Chesterfield County, Virginia**

Evergreen Solutions was on contract with Chesterfield County to conduct a Classification and Compensation Study and Pay Plan Development for Public Safety. The study included an examination of the County’s classification and compensation system in order to make recommendations for compensation policies, practices, and procedures; and develop a Public Safety Pay Plan. Evergreen worked with the County to develop a comprehensive plan for County employees based upon an objective analysis and thorough evaluation of job content and internal equity. Evergreen reviewed current job descriptions, salary relationships, classifications, and grade methodology. Based on this review and a compression analysis, Evergreen recommended pay and classification strategies for the County. Evergreen also identified and recommended pay incentives and supplements for employees and policies and procedures to administer the new Public Safety Pay Plan. **Note:** Evergreen was again hired in 2021 by Chesterfield County and Chesterfield County Public Schools to conduct a Compensation Study. Chesterfield County had 3,600 employees at the time that were included in the study.



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**Classification and Compensation Study  
Mecklenburg County, Virginia**

Evergreen Solutions was engaged with Mecklenburg County to conduct a Compensation and Classification Study. Evergreen evaluated current positions, inclusive of current County, Constitutional Officers, and Social Services positions, and surveyed participants/comparable organizations from a pre-determined list of entities and developed and implemented a compensation study that included wages as well as local government-controlled benefits, such as employer and employee healthcare contribution percentages, Flexible and Health Savings Account matches, and leave accruals; and analyzed the results (Local government-controlled benefits does not include contributions to the Virginia Retirement System). Evergreen further reviewed the position descriptions for individuals and developed a classification plan to include all County Departments, Constitutional Officers, and Social Services(Directors and employees); document and develop, as necessary, the requirements of each position including, education, experience, certification and other related information; assigned each job description to a classification system that reflected equitable placement between the various job responsibilities; and provided suggestions for retitling any current positions, as necessary, to remain competitive, based on the compensation study as well as general market knowledge.



**Classification and Compensation Plan Review and Guidance  
City of Raleigh, North Carolina**

Evergreen was hired in the latter part of 2020 to provide Compensation and Classification Plan Review and Guidance to the City for its workforce of more than 4,500 employees to ensure that the City was competitive with the regional market. **Note:** Evergreen was hired in 2019 to analyze compression for the City's fire and police pay plans and recommend conversion options for open range pay plans. In addition, Evergreen was hired in 2020 to review the organizational structure of the Transportation Planning Service Unit.



**Compensation and Classification Study  
City of Goldsboro, North Carolina**

Evergreen Solutions was engaged with the City of Goldsboro to conduct a Compensation and Classification Study. Evergreen's consultants evaluated the current compensation and classification systems for the City; conducted a market survey of comparable peer organizations; developed a final report that outlined the methodology used to conduct the compensation and classification study, documented the results of the study, including all market research; and developed recommendations for the administration of the updated compensation and classification systems.



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**Classification and Compensation Study  
City of Rocky Mount, North Carolina**

Evergreen Solutions was retained by the City of Rocky Mount to conduct a Classification and Compensation Study for its 1,365 employees. Evergreen's consultants conducted a comprehensive salary study of appropriate public and private sector organizations as well as non-profits and utilities to determine whether the City's salaries, benefits and wages were competitive within the appropriate job market and reviewed the effectiveness of the City's overall compensation system. Evergreen further reviewed the City's salary structure and pay plan to ensure the City can support recruitment and retention of employees more effectively and reviewed the accuracy of position titles and descriptions regarding unique characteristics of the position, essential job functions, minimum qualifications, working conditions, licensing requirements, on-call requirements, and supervisory requirements, etc. Evergreen also provided an analysis of the existing internal hierarchy and internal career ladders where appropriate and assisted the city with efforts to more fully develop and clearly outline job progression opportunities and provide recognizable compensation growth. In the end, Evergreen developed and presented final recommendations with an implementation plan that included the impact of implementing recommended adjustments to current salaries both immediately and in the future. **Note:** Evergreen was again hired in 2024 to conduct a compensation plan update for the City.



**Classification and Compensation Study  
City of Hendersonville, North Carolina**

Evergreen Solutions was retained by the City of Hendersonville to conduct a Classification and Compensation Study. The study included the review of the existing classification plan, position descriptions and methods of reclassification, the performance of a salary study and the preparation of pay plan schedules, job descriptions.



**Classification and Compensation Study  
City of Southport, North Carolina**

Evergreen was retained by the City of Southport to conduct a Classification and Compensation Study. Evergreen reviewed the current City's environment data; evaluated and built a projected classification plan; conducted a market salary survey; developed strategic positioning recommendations and recommendations for compensation administration; and provided revised class descriptions and FLSA determinations.



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**Pay and Classification Study  
Buncombe County, North Carolina**

Evergreen Solutions was retained by Buncombe County to conduct a Pay and Classification Study. Evergreen Solutions conducted a classification analysis using Evergreen Solutions' Job Assessment Tool job evaluation methodology in addition to a statistical assessment of current conditions. Evergreen Solutions also analyzed local market and benefits data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation and classifications plan were made and procedures for the continued maintenance of the plans were provided. **Note:** Evergreen was again hired in 2023 to conduct a Compensation Study.



**Position Analysis and Revision Project  
Harnett County, North Carolina**

Evergreen Solutions was retained by Harnett County to conduct a Position Analysis and Revision Project. Evergreen's consultants conducted an analysis of current County positions to determine the plan of action, whether to completely recreate the descriptions or to possibly update those that were more current, resulting in a consistent format for all descriptions. Evergreen then made recommendations regarding the process; provide implement options; provided recommendations and training for best practices to maintain up-to-date descriptions going forward; advised the County regarding FLSA Exempt/Nonexempt status for all updated job descriptions; and assessed the County positions to determine any opportunities for consolidation of existing positions and job descriptions.



**Comprehensive Position Classification and Compensation Study  
Gaston County, North Carolina**

Evergreen Solutions was engaged with Gaston County to conduct a Comprehensive Position Classification and Compensation Study for its 1,592 employees. The primary objective of the study was to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allowed the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen Solutions' consultants performed a comprehensive review of the County's classification and compensation system which included conducting an internal equity analysis of employee salaries.

Evergreen conducted a market analysis in which the County's salary ranges and benefit offerings were compared to the salary ranges and benefit offerings at peer organizations. Evergreen Solutions provided recommendations to create a system that not only aligned with the State of North Carolina's substantially equivalency requirement, but allowed for flexibility so as not to inhibit those departments that were not required to have this alignment. **Note:** Evergreen was again hired in 2021 to conduct a similar study for the County.



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### **Classification and Compensation Study and Benefits Survey New Hanover County, North Carolina**

Evergreen Solutions was retained by New Hanover County and the New Hanover Alcohol Beverage Control Board to conduct a Classification and Compensation Study for its employees. Evergreen Solutions' consultants conducted an employee classification and compensation study of public and private employers who were providing equitable services and, based on that study and determined if individualized position/job descriptions were needed, and if so, assisted in the development of those descriptions. Evergreen Solutions prepared a comprehensive analysis that identified New Hanover County's competitive position in the labor market and provided a recommendation for total salaries and benefits, including the total compensation package of insurance and other benefits (including paid leave), and prepared recommendations for compensation policies, including variable incentive pay options, to maintain competitiveness, reward employees, and ensure equity.

Select County and ABC Board members were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

**Note:** Evergreen was again hired in 2022 to conduct an update of the County's Classification and Compensation plans.



### **Compensation and Classification Study Transylvania County, North Carolina**

Evergreen was retained by Transylvania County to conduct a Compensation and Classification Study. Evergreen evaluated the current compensation and classification plan and identified classification of existing positions. Evergreen identified appropriate benchmarking standards and conducted a total compensation survey with comparable municipalities and private sector employers, when applicable. Survey data was provided to the County in a usable electronic format for analysis for each position. Evergreen conducted a solution analysis and developed strategic positioning recommendations. Evergreen reviewed the total compensation system, identified potential pay compression and/or inequities (both internally and to the market), and provided recommendations. **Note:** Evergreen was again hired in 2022 to conduct a Compensation and Benefits Study.



### **Compensation and Classification Study Union County, North Carolina**

Evergreen Solutions was retained by Union County to conduct a Compensation and Classification Study. Evergreen Solutions performed the following tasks:



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- conducted a comprehensive evaluation of every classification within the County to determine relative worth within the organization (internal equity), placement in the organizational pay plan and for the establishment of pay bands;
  - established appropriate benchmarking standards and included should be a comparison and analysis of salaries and wages of like or similar jobs (external equity) in comparable government and private employers in North Carolina, South Carolina and Virginia for which the County competed for a labor supply;
  - created class/position descriptions that included required knowledge, skills and abilities (KSA) for each position class in a standardized format. The analysis produced a sampling that produced statistical reliability and valid results;
  - recommended needed changes to the existing compensation & classification plan to alleviate salary compression issues;
  - provided a multi-year implementation plan to adjust compensation as identified in analysis;
  - provided a synopsis prepared for management review, covering the salient features of the proposal including overall costs and term of work; and
  - provided a procedure manual and training for Human Resources employees that enable them to maintain the recommended classification and compensation plan.



### **Salary Equity Study Guilford County, North Carolina**

Evergreen Solutions was retained by Guilford County to assess pay equity based on race and gender for all County employees. Evergreen's consultants performed a review of approximately 1,500 plus positions for internal salary equity. This was accomplished by reviewing the incumbent's related education and experience prior to County employment and related experience gained with the County. Evergreen's consultants also reviewed job descriptions, in conjunction with County Staff, to ensure that content and titles were current, accurate and were consistent with FLSA, EEO and ADA considerations. At the conclusion of the study, Evergreen made recommendations by individual position/employee for internal salary equity pay adjustments and provided an analysis that included a statistical treatment of pay placement and progression.



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**Compensation, Classification, and Benefits Study  
Haywood County, North Carolina**

Evergreen Solutions was retained by Haywood County to conduct a Compensation, Classification and Benefits Study. Evergreen's consultants reviewed the County's current pay grades and classification information; conducted salary and benefits surveys of the County's peers; made recommendations to update or restructure the County's pay grades and classification system; and provided revised job descriptions for the updated/restructured classification system.



**Classification System and Pay Plan Development Study  
Franklin County, North Carolina**

Evergreen Solutions was retained by Franklin County to conduct a Classification System and Pay Plan Development Study. The Evergreen Team worked with the County to obtain the current classification system and pay plans. After an initial assessment, Evergreen consultants collected data using the Job Assessment Tool© and conducted market salary and benefits surveys to develop recommendations regarding strategic positioning, a new job classification, and compensation and position evaluation system based on analyses of the data gathered. **Note:** Evergreen was also hired to conduct a Performance Evaluation Study.



**Classification and Compensation Study  
Dare County, North Carolina**

Evergreen Solutions was engaged with Dare County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a comprehensive evaluation of every job to determine relative worth within the County (internal equity), placement in the organizational structure, and to establishment appropriate pay ranges. Evergreen further established appropriate benchmarking standards to include a comparison and analysis of salaries and benefits of like or similar jobs (external equity) of comparable local governments and private employers in various markets for which the County competed for labor supply.



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**Classification and Total Compensation Study  
Ashe County, North Carolina**

Evergreen Solutions was retained by Ashe County to conduct a Classification and Total Compensation Study. Evergreen performed the following tasks: reviewed the existing classification plan and related job descriptions; conducted a salary study that included public and private employers who were providing comparable services; prepared recommendations for compensation policies, including cost of living increases, career ladders, certification incentives, to ensure internal pay equity; and examined and compared benefits in relation to other local governments.



**Classification and Compensation Study  
Onslow County, North Carolina**

Evergreen was retained by Onslow County to conduct a Classification and Compensation Study. Evergreen provided an updated market study of comparable entities, evaluated the current compensation and classification, performed a pay compression analysis of all County positions, and developed policy recommendations for the administration and maintenance of the classification and compensation system.



**Compensation Strategy Review and Classification Study  
Town of Clayton, North Carolina**

Evergreen Solutions was engaged with the Town of Clayton to conduct a Compensation Strategy Review and Classification Study. The focus for this project was internal equity and correcting salary compression where it existed, as well as an external market benchmarking/analysis. Recommendations included a review of the current classification system taking into account changes in Federal and State laws in order to provide for legally defensible classification specifications (essential job functions, FLSA, especially exempt/non-exempt status). Evergreen's consultants identified and recommended career pathing, as well as established recommended titling guidelines based on rules incorporating organizational hierarchy. **Note:** Evergreen was again retained in 2022 to conduct an Organizational/ Staffing Study for the Town. Evergreen was also hired in 2024 to conduct a Compensation Plan Update.



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## **Classification and Compensation Study Town of Huntersville, North Carolina**

Evergreen Solutions was retained by the Town of Huntersville to conduct a Classification and Compensation Study. Evergreen performed the following tasks:

- conducted a comprehensive evaluation of every job classification to include job surveys, individual employee interviews or interviews within similar work groups;
- analyzed data and follow-up with employees and/or supervisors to clarify any concerns;
- made initial recommendation to HR Director, Town Management and Department Directors for any changes to existing positions and overall classification plan;
- based on initial recommendations and feedback, conducted any follow-up meetings and drafted a classification plan and specifications;
- reviewed and updated job descriptions to ensure that content and titles were current, accurate and consistent with job analysis and all relevant federal and state statutes;
- identified the benchmark positions and any specialized positions from each classification to survey;
- determined a relevant job market with town management to include surrounding and comparable municipalities and private sector as appropriate;
- conducted salary survey that include salary ranges, pay incentives, and benefits;
- analyzed survey data analysis and recommend pay structures (grades/classification groups and pay ranges);
- reviewed the impact on current employees for pay adjustments based on the recommended structure and existing/resulting compression adjustments;
- developed adjustment strategies and cost scenarios which included a short and long term strategy; and
- provided recommendations to HR Director and Town Management for pay structures and related pay adjustments.



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**Employee Compensation Study  
City of Beaufort, South Carolina**

Evergreen Solutions was engaged with the City of Beaufort to conduct an Employee Compensation Study. Evergreen's consultants: provided a comprehensive evaluation of every job within the City to determine relative worth within the organization for internal equity; established appropriate benchmarking standards and conducted salary analysis as needed for similar positions with comparable South Carolina municipalities; recommended salary range for each position based on the compensation survey results and established step progressions within the ranges; prepared a new salary structure based on the results of the survey and best practices; identified potential or existing pay compression issues and provided solutions; identified any extreme individual or group compensation inequities and provided a recommended corrective action plan and process to remedy deviations; analyzed and recommend changes to the present compensation structure to meet market analysis; and recommended implementation strategies for compensation practices, based on market demands, including pay for performance, skill pay, certification/education compensation, special assignment compensation, bilingual pay, promotional pay, and acting assignment pay.



**Wage and Compensation Study  
City of Folly Beach, South Carolina**

Evergreen Solutions was retained by the City of Folly Beach to conduct a Wage and Compensation Study. The primary objectives of the study were to: ensure fair and equitable compensation relationships within the City; provide competitiveness with the external market; provide clear guidance on progression within identified ranges; and provided implementation strategies and priorities moving forward.



**Employee Compensation and Classification Study  
City of Greenwood, South Carolina**

Evergreen Solutions was retained by the City of Greenwood to conduct an Employee Compensation and Classification Study. Evergreen's consultants evaluated the City's current market position by comparing the City to other organizations, and provided recommendations on a phased implementation approach for recommendations. Evergreen's consultants further assisted the City in determining creative strategies to attract and retain a qualified workforce.



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**Classification, Compensation and Benefits Study (Included a Staffing Study)  
City of Clemson, South Carolina**

Evergreen Solutions was retained by the City of Clemson to conduct a Classification and Compensation Study and Staffing Study. Evergreen reviewed the existing classification and compensation plan to ensure that all positions within the City were internally equitable and externally competitive. The objectives of the study were to: have a creditable Classification and Compensation Plan that ensured positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills and abilities were classified together; provide salaries commensurate with assigned duties and provides recognizable compensational growth; and provide justifiable pay differential between individual classes and maintains currency with relevant labor markets. The end product of the study included recommendations for a classification schedule, job descriptions, a wage comparison with comparable cities/towns and a compensation plan.

The Staffing Study documented and reviewed existing operations of the City through a collection of Key Performance Indicators (KPIs) and other outcome-related data. Evergreen developed and collected the staffing and outcome survey and analyzed peer data to determine the relevant staffing range for each department/function, service, and level. Evergreen reviewed the results collected and developed recommendations that identified all gaps between the current and desired staffing by level and functional area of the City.



**Classification and Compensation Study  
City of Mauldin, South Carolina**

Evergreen Solutions was retained in 2023 by the City of Mauldin to conduct a Classification and Compensation Study. Evergreen recommended the assignment of each position within the classification structure using a standardized rating system that analyzed each position against multiple evaluation criteria and conducted a comprehensive benchmark market analysis of all City positions with comparable and surrounding (regional) jurisdictions, institutions of higher education, and applicable private/public sector competitors. **Note:** Evergreen previously conducted a similar study for the City.



**Compensation Study  
City of Pickens, South Carolina**

Evergreen was hired by the City of Pickens to conduct a Compensation Study. Evergreen conducted a comprehensive preliminary evaluation of the existing compensation plan(s) for the City; identified positions to benchmark; identified a comprehensive list of targets; conducted a market salary assessment; developed a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement; slotted classifications into the revised or new pay scale; and developed recommendations for a maintenance program.



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**Classification and Compensation Study  
City of Lancaster, South Carolina**

Evergreen Solutions was retained by the City of Lancaster to conduct a detailed compensation and classification analysis of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity. **Note:** Evergreen previously conducted a similar study for the City.



**Comprehensive Classification, Compensation, Performance Management  
and Benefits Study  
City of Columbia, South Carolina**

Evergreen Solutions was retained by the City of Columbia to conduct a comprehensive evaluation of the City's current compensation and classification structure for its 2,352 employees. The primary objective of the study was to determine whether the City's current pay structure, policies, and practices were effective as compared to peer organizations or whether future adjustments were needed. Evergreen's consultants conducted a job-task analysis/job audit of all employee positions to verify and validate information from existing job descriptions. Based on the data collected, Evergreen defined the essential functions of the job class, including, required education, experience, knowledge, skills, and abilities, to ensure compliance with ADA regulations; identified discrepancies between existing and proposed classifications; reported areas that were understaffed or underutilized; identified management, supervisory, professional, technical and general employees, including each employee's FLSA status (exempt/non-exempt); evaluated and recommended other programs that could be implemented by the City to attract candidates for hard-to-recruit positions; and developed a tool that the City could utilize to evaluate and process future reclassifications.

To ensure external equity, Evergreen consultants compared the City to what other local jurisdictions were doing as it related to salary ranges, steps within ranges, and range spread, and listed options and made recommendations that could improve the City's position in the market and its ability to recruit and retain qualified employees. Evergreen reviewed policies and procedures to determine consistency with prevalent practices among City governments and other local jurisdictions related to setting salaries for new hires, and handling transfers, promotions, additional duty pay and retroactive adjustments.

Evergreen also developed and recommended a new and revised performance appraisal instrument(s) that would support the City's mission and strategic objectives and the City's compensation philosophy, and would work in concert with the classification and pay system that was established. Evergreen consultants worked with the Human Resources Department and other City officials to link the proposed performance evaluation system to the pay structure, and identified any real or perceived internal equity and salary compression issues within the City's various departments/offices, and listed options to address such questions as to how these issues were addressed by other municipalities.



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In the end, Evergreen provided recommendations to the classification and compensation structure along with associated costs or savings of implementing those recommendations. Evergreen also provided training/education presentations to managers and senior management staff to ensure that there was an understanding and commitment to the new classification and compensation system. **Note:** Evergreen Solutions was again hired in 2022 to conduct a Compensation Study.



**Classification, Compensation, and Time Use Study  
Oconee County, South Carolina**

Evergreen was retained by the Oconee County to conduct a Classification, Compensation, and Time Use Study. Evergreen performed the following services: provided for a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and for the establishment of pay ranges and progressions within the ranges; reviewed all current job classifications, confirm, and recommended changes to hierarchical order of jobs using proposed evaluation system; recommended revision of policies and procedures related to compensation; established appropriate benchmarking standards and conducted a salary survey for similar positions with comparable municipalities as required; identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation structure to meet market analysis. This included recommendations for individual positions; evaluated how employees allocated their time during working hours and identified where time may be wasted or where productivity could be enhanced; provided recommendations for guidelines, vehicles and tools for classification and compensation structure. Evergreen further designed guidelines for progression within job classifications; outlined transition strategy and develop strategies for maintaining internal equity and market competitiveness over time; and assisted the County in assessing financial impacts to achieve market parity and potential inequities.



**Classification and Compensation Study Services  
Beaufort County, South Carolina**

Evergreen Solutions was engaged with Beaufort County to provide Classification and Compensation Study Services. The purpose of the study was to address changes in county operations and staffing over the past decades, which may have affected the type, scope, and level of work being performed. The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differentials between individual classes; and maintain a competitive position with other comparable governmental entities and private employers within the same geographic area.



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**Classification and Compensation Study Services  
Dillon County, South Carolina**

Evergreen Solutions was retained by Dillon County to provide Classification and Compensation Study Services. Evergreen performed the following tasks: provided for a comprehensive evaluation of every job to determine relative worth within the County for internal equity and for the establishment of pay ranges and step progressions within the ranges; reviewed all current job classifications, confirmed, and recommended changes to hierarchical order of jobs using Evergreen's evaluation system; established appropriate benchmarking standards and conducted a salary survey for similar positions with comparable South Carolina jurisdictions; identified potential pay compression issues and provided potential solutions; and analyzed and recommended changes to the present compensation structure to meet market analysis.



**Compensation and Classification Study  
Greenwood County, South Carolina**

Evergreen Solutions was retained by Greenwood County to conduct a Compensation and Classification Study. Evergreen performed the following tasks: reviewed and evaluated each pay grade for accuracy and recommended necessary updates; provided a comprehensive evaluation of each job within the County, based on the current job description, to determine relative worth within the organization for internal equity and the establishment of pay grades; reviewed all current job descriptions, confirmed, and recommended changes to the hierarchical order of jobs using Evergreen's evaluation system; established proper benchmarking standards and conducted salary surveys for similar positions within the State of South Carolina; identified potential pay compression issues and provide potential solutions; and analyzed and recommended changes to the present compensation structure to meet market analysis.



**Salary Parity Study / Structural and Compensation Systems Study  
Charleston County, South Carolina**

In 2005-06, Charleston County conducted a Classification and Compensation Review using another consulting firm. Then in 2007, Evergreen Solutions was hired by the County to review the results and verify the recommendations that accompanied the study. The primary issue examined by Evergreen was the internal equity relationships present within the County's pay plan. The Evergreen Team administered a job analysis tool to County employees that helped determine job worth and verify internal equity relationships as they relate to compensation. Although the study's primary emphasis was ensuring that internal equity relationships were proper, the study also ensured that employees were paid consistently with the market. Evergreen provided detailed recommendations for adjusting the County's pay and classification structure and developed an implementation plan complete with costing information.



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**Note:** Evergreen was again hired in 2012 to conduct a Structural and Compensation Systems Study. The Evergreen Team worked with elected official and employee committee throughout the process. Our phases included employee outreach, best practice research, and consensus building to recommend a 21<sup>st</sup> Century approach to compensation and classification management.

**Note:** Evergreen Solutions was again retained in 2016 to assist Charleston County with conducting comprehensive market analysis using selected benchmarks. A market survey was conducted to determine the external equity of the County against its peers.

**Note:** Most recently, Evergreen was hired in 2021 by Charleston County to conduct a Compensation Study. A market survey was conducted to determine the external equity of the County against its peers.



**Classification and Compensation Study  
Berkeley County, South Carolina**

Evergreen Solutions was retained by Berkeley County to conduct a Classification and Compensation Study for 1,153 employees. Evergreen’s consultants reviewed the County’s current classification and compensation plan and recommended a consistent and competitive market position that the County could maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the County based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



**Pay and Classification Study  
Dorchester County, South Carolina**

Evergreen Solutions was retained by Dorchester County Government to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the County. As part of the study, Evergreen conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the County. Finally, a detailed plan was developed to provide the County with specific steps to implement an equitable and competitive compensation and classification plan.

**Note:** Evergreen was again hired in 2020 to conduct a Compensation Plan Update.



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### **Classification and Compensation Study Pickens County, South Carolina**

Evergreen was retained by Pickens County to conduct a Classification and Compensation Study for 800 employees. Evergreen performed the following tasks: provided a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and to establish of pay ranges and progressions within the ranges; reviewed all current job classifications and recommended changes to hierarchical order of jobs using Evergreen's evaluation system; established appropriate benchmarking standards and conducted a salary survey with comparable local governments and private employers as required; identified potential pay compression issues and provided solutions; and analyzed and recommended changes to the County's compensation structure to meet market analysis.



### **Classification and Compensation Study Town of Hilton Head Island, South Carolina**

Evergreen Solutions was engaged with the Town of Hilton Head Island to conduct a Classification and Compensation Study for all its employees. The study included the following primary objectives: to conduct a thorough, complete and accurate class specifications/job descriptions for all positions; appropriate valuation of each position relative to other Town positions; and to develop a competitive total rewards package (salary and benefits) relative to similar positions in the market.

Evergreen provided written guidelines for maintaining class specifications/job descriptions, for evaluating/re-evaluating job class specifications/job descriptions and for maintaining model compensation structure (s). Evergreen further recommended pay administration policies to include, but not be limited to, policies regarding movement through ranges, adjustments within pay grades, adjustments for assumption of additional duties (temporary or permanent), reclassifications, promotions, transfers, demotions, career ladders, etc. and recommended reliable external market data sources for salary structure adjustments and determination of merit budget.

Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future merit allocation approaches, considering changes to classification and compensation program and limited budgets. **Note:** Evergreen was again hired in 2020 and in 2025 to conduct a similar study for the Town.



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**Pay and Classification Study  
Town of Moncks Corner, South Carolina**

Evergreen Solutions was engaged with the Town of Moncks Corner to conduct a Pay and Classification Study for its employees. As part of the study, Evergreen conducted orientation sessions, focus groups, and interviews. Employees completed a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A market salary survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures were recommended.



**Compensation Study  
Town of Central, South Carolina**

Evergreen was hired by the Town of Central to conduct a Compensation Study. Evergreens consultants conducted an analysis of pay against the market and prepared a summary report of the survey results in order to make recommendations for updating the Town's pay plan.



**Classification and Compensation Study  
City of Atlanta, Georgia**

Evergreen Solutions was retained by the City of Atlanta to conduct a Classification and Compensation Study for its more than 8,000 employees. The primary objectives of the study were to: ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within similar geographic areas who are providing comparable and equivalent services.



**Classification and Compensation Study  
City of Douglasville, Georgia**

Evergreen Solutions was retained by the City of Douglasville to conduct a Classification and Compensation Study and Analysis of its workforce consisting of 225 full-time employees in approximately 96 job titles. Evergreen performed the following tasks:



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- Evaluated the City's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors.
  - Reviewed all current job descriptions and analyzed same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); and special requirements including licensing and certifications.
  - Reviewed the City's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments.
  - Analyzed all existing job family classifications, pay grades and salary ranges and recommended modifications as necessary.
  - Analyzed all existing FLSA classifications and recommended modifications as necessary.
  - Identified potential pay compression issues and provided alternative solutions.

**Note:** Evergreen was again hired in the latter part of 2021 to conduct a Classification and Compensation Plan Update.



### **Compensation Study City of Dalton, Georgia**

Evergreen was hired by the City of Dalton to conduct a Compensation Study. Evergreen conducted a salary survey to determine the City's competitiveness in the market. Based on the results of the survey, Evergreen updated to City's pay plans. **Note:** Evergreen previously conducted a Classification and Compensation Study for the City. In 2024, The City again hired Evergreen to conduct a Classification and Compensation Study.



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### Compensation Analysis City of Alpharetta, Georgia

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers' both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of the study, the City of Alpharetta employed 414 full-time and five part-time positions, excluding senior management and elected officials, defined across 132 position descriptions. The base salary ranges for these positions were divided among eight pay grades. The primary goals of this project were to: determine the City's competitive position within the marketplace in terms of its overall compensation package; determine the relative value and competitive positioning of each compensation/benefit area; and identify any weaknesses within the components of the City's existing compensation package that may negatively impact the organization's ability to attract and retain talented employees. **Note:** Evergreen was again hired by the City on 2019 to conduct a Comprehensive Pay and Classification Study.



### Employee Classification and Compensation Study City of Savannah, Georgia

Evergreen was engaged with the City of Savannah to conduct an Employee Classification and Compensation Study for its workforce of 2,500 employees. Evergreen developed a comprehensive job classification system that accommodated the City's need for a flexible, internally and externally equitable, defensible, market sensitive and easily administered system for all current and future jobs within the City. Evergreen established career paths for occupations, provide clear distinctions in different job levels, established performance standards/job qualifications for all newly created job classifications, produced job descriptions that were legally defensible and are in accordance with ADA and FLSA, assigned classifications to pay ranges designed by the City that were labor market appropriate, and trained Human Resource staff so that they could maintain, enhance, and use the classification system to identify and consistently apply the system to modify an existing position or classification or create a new position or classification scheme.

Evergreen further assisted the City in formulating a formal compensation philosophy and developing a compensation system for all job classifications based upon the adopted compensation philosophy. Evergreen identified comparable benchmark employers to guide the City's future employee salary and benefit decisions in order to facilitate the retention and attraction of high performing staff members, while being financially sustainable.



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## **Comprehensive Classification and Compensation Study City of Garden City, Georgia**

Evergreen Solutions was retained by the City of Garden City to conduct a Comprehensive Classification and Compensation Study for its workforce. The primary objectives of the Classification and Compensation Study were to: attract and retain qualified workers who would be paid equitable salaries; provide fair salaries for all workers of the City; and provide a salary structure that enabled the City to maintain a competitive position with other cities and companies within the same geographic area. To accomplish this, Evergreen: worked with the City's management staff to identify a market position for the City; developed a comprehensive labor market salary survey for the Chatham County area and surrounding municipalities that reflected both cities and private industry; analyzed existing internal hierarchy based on job relationships, identified problem areas within the internal hierarch system, and proposed implementation methods to correct identified problems; reviewed current classification grade methodology, and proposed recommended strategies for the City of Garden City; and developed a pay plan identifying specific parameters (i.e., percent spreads between ranges and within ranges). In the end, Evergreen prepared a cost analysis for positions that fell below the proposed minimum salaries following reclassification and developed recommendations and an instrument for the ongoing internal administration and maintenance of the proposed classification/compensation plan.

**Note:** In 2019 Evergreen was hired to conduct a Compensation Plan Update. More recently, Evergreen was retained in 2021 to conduct another Compensation Plan Update.



## **Classification and Compensation Study City of South Fulton, Georgia**

Evergreen was retained by the City of South Fulton to conduct a Classification and Compensation Study. Evergreen performed the following tasks: provided a comprehensive evaluation of every job within the City to determine relative worth within the City for internal equity and for the establishment of pay ranges and step progressions within the ranges; evaluated the feasibility of having a twenty (\$20) dollar an hour minimum wage; reviewed all current job classifications, confirmed and recommended changes to the hierarchal order of jobs using the proposed evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions with comparable Georgia municipalities as required; identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the current compensation structure to meet market analysis; and evaluated and recommended appropriate compensation (salary and fringe benefits) for elected officials.



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### **Comprehensive Classification and Compensation Study City of Tybee Island, Georgia**

Evergreen Solutions was retained by the City of Tybee Island to conduct a Comprehensive Compensation and Classification Study. Evergreen's consultants reviewed the City's current compensation plan (salary grade levels and steps) to understand the current challenges of recruiting and retaining employees and identified and recommended a consistent and competitive market position that the City could strive to maintain based on a salary survey of both private and public sector peer organizations. In the end, Evergreen recommended an appropriate salary range for each position in the City based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity.

Evergreen prepared a new salary structure based on results of the salary survey and best practices and developed guidelines to assist the City staff with determining the starting pay for new employees based on knowledge and experience above minimum requirements of the position, how difficult the position is to fill, and market competitiveness. Evergreen further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan. **Note:** In 2022, Evergreen was again hired by the City to conduct a Compensation Study.



### **Pay and Classification Study City of Roswell, Georgia**

Evergreen Solutions was retained by the City of Roswell to conduct a Pay and Classification Study for approximately 1,000 employees. Evergreen's consultants evaluated the City's present compensation and classification structure, as compared to the relevant job market, for comparable positions in both the public and private sectors to ensure job market competitiveness, internal equity, and fiscal responsibility. Geographic applicability, specific job comparability, and departmental structure was considered to identify peers, and a market salary survey was conducted. A report of findings and recommendations, including cost estimate to adjust employee pay for new paygrades, was presented to the City Leadership Team, and Elected Officials. **Note:** Evergreen was previously hired by the City to conduct a Salary and Benefits Survey.



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### **Classification and Compensation Plan Development City of Brookhaven, Georgia**

Evergreen Solutions was engaged with the City of Brookhaven to develop a Classification and Compensation Plan. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; determine the relative value and competitive positioning of each compensation area; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results. Evergreen also recommended a performance management and evaluation program, including a comprehensive evaluation form and rating system for fiscal year 2016 implementation. The evaluation plan included a performance-based component. **Note:** Evergreen was again hired by the City in 2019 to conduct a Salary Review.



### **Classification and Compensation Study and Analysis City of Riverdale, Georgia**

Evergreen was hired by the City of Riverdale to conduct a Classification and Compensation Study and Analysis. Evergreen performed the following: provided a comprehensive evaluation of every job within the city to determine relative worth within the organization for internal equity; reviewed all current job classifications and recommended changes to the hierarchical order of jobs; established appropriate benchmarking standards and conducted a market salary survey; identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation structure; and developed guidelines to assist City staff with determining the starting pay for new employees.



### **Compensation Salary Study and Survey Forsyth County, Georgia**

Evergreen Solutions was retained by Forsyth County to conduct a Compensation Salary Study and Survey. Evergreen reviewed current wage and salary plans as well as salary grade levels to understand the County's challenges in recruiting and retaining employees. Evergreen conducted salary and benefits surveys of comparable labor markets by creating and utilizing survey documents developed and designed specifically for Forsyth County Government. The surveys were designed to capture actual salary, base salary, benefits, and classification salary range information to ensure that the County's salaries and classification salary ranges were competitive with other public organizations in the greater metro Atlanta labor market based upon 2019 cost of living projections and market influences. Evergreen worked with the Executive Team to identify the comparable labor markets, including both public sector, utility agency, and private sector employers, for the compensation survey.



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Evergreen prepared a detailed report of findings, written recommendations, and associated implementation costs for the following: specific benchmark classifications, any classification salary range adjustments, and other salary components, which impact the County's competitive position. All findings included 2018 findings/costs and projected 2019 market influences, cost of living, and any other relevant impacting factors deemed important. **Note:** Evergreen previously conducted a Compensation and Benefits Study for the County.



### **Classification and Compensation Study DeKalb County, Georgia**

Evergreen was hired by DeKalb County to conduct a Classification and Compensation Study. The primary objectives of the study are to: develop and implement a modern, equitable, legally defensible, and competitive compensation system to increase employee value proposition; develop a streamlined and consistent classification system that promotes equity and clarity across all departments; establish a competitive salary structure that reflects current market conditions and supports the County's ability to attract and retain a highly skilled workforce; enhance opportunities for employee growth by defining clear career pathways and promotional opportunities; address pay compression and other disparities to foster a fair and productive work environment; ensure compliance with all relevant federal, state, and local regulations to maintain a legally defensible compensation framework; design a compensation structure that balances competitiveness with fiscal responsibility and sustainability to support long-term organizational objectives; conduct a thorough analysis of the County's current job classifications and compensation structures to identify areas for improvement; develop a comprehensive job evaluation system that considers factors such as job complexity, required skills, and responsibilities; provide recommendations for a transparent and adaptable compensation system that aligns with industry best practices; and establish mechanisms for ongoing evaluation and updates to the classification and compensation systems to ensure continued relevance and competitiveness.



### **Classification Study Cherokee County, Georgia**

Evergreen Solutions was retained Cherokee County to conduct a Classification Study. Evergreen conducted a job analysis by collecting a Job Assessment Tool from employees to determine the appropriate hierarchy of jobs to ensure internal equity within the County and reviewed and revised job descriptions as needed. **Note:** Evergreen previously conducted a compensation study in 2022 and a compensation and benefits study in 2018.



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## **Classification and Compensation Study and Analysis Columbus Consolidated Government, Georgia**

Evergreen Solutions was engaged with Columbus Consolidated Government to conduct a Classification and Compensation Study and Analysis for its more than 3,000 employees. Columbus is Georgia's first consolidated city/county government, the second largest city in Georgia and is a recognized leader among its peer cities, and takes pride in its operational efficiency and the excellent quality of life it fosters.

Evergreen conducted an external market analysis to determine whether the City was competitive with its peers. Evergreen worked with Human Resources and City leadership to review its classification and compensation structure and recommended comparable public and private survey markets. Evergreen considered the compensation and benefits package received by employees with the City as it related to both the external and internal markets. The City's objectives for this study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic areas.



## **Compensation and Pay Classification Plan Study City of Foley, Alabama**

Evergreen Solutions was retained by the City of Foley to conduct a Compensation and Pay Classification Plan Study. The objectives of the study were to conduct and implement a total compensation plan (including benefits) structure for the City's workforce which would provide both internal and external equity, establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, determine and implement a program of accurate job descriptions based on job analysis, and develop a maintenance program for job descriptions and classification recommendations.

Evergreen conducted a wage and benefit survey among competing jurisdictions as well as public and private organizations to determine competitive wages in the appropriate labor market(s). Using the survey results, Evergreen assigned each job to a pay grade with a view toward achieving proper internal relationships among classes and making salary ranges competitive with relevant markets with due consideration of the financial condition of the City. Evergreen provided estimates of the cost to install and implement the new pay plan and recommended a methodology for implementation. **Note:** Evergreen was again hired in 2022 to conduct a similar study for the City.



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**Classification and Compensation Study  
City of Auburn, Alabama**

Evergreen Solutions was retained by the City of Auburn to conduct a Classification and Compensation Study for its 1,200 employees. Evergreen conducted a job analysis to determine internal equity and conducted a salary survey to determine whether the City's salaries were competitive in the market. Evergreen also reviewed and updated job descriptions, as needed.



**Compensation and Benefits Study  
City of Mobile, Alabama**

Evergreen Solutions was retained by the City of Mobile to conduct a Compensation and Benefits Study for its 1,100 employees. Evergreen's consultants surveyed the market to determine the City's market position and competitiveness with its peers as it related to compensation and benefits.



**Classification and Compensation Study  
Baldwin County, Alabama**

Evergreen Solutions was retained by Baldwin County to conduct a Comprehensive Classification and Compensation Study. Evergreen consultants conducted a job analysis, evaluated and revised job descriptions, conducted a market salary and benefits survey, developed a new pay plan based on the market results and job analysis, and prepared and presented a final report that recommended a new classification and compensation structure for the County.



**Compensation, Pay and Benefits Study  
Lee County Commission, Alabama**

Evergreen Solutions was retained by the Lee County Commission to conduct a Classification, Pay and Benefits Study for approximately 436 employees. To begin this study, Evergreen Solutions conducted a comprehensive, preliminary evaluation of the County's current pay scale and existing classification plan. Evergreen used its unique Job Assessment Tool® (JAT) to identify classifications of positions and perform job analyses, including an evaluation of supervisory comments. Follow-up interviews were conducted, as needed, and classification changes recommended.

Benchmarks and targets were identified for a market salary and benefits survey. Survey data and internal equity (with proper consideration of the financial condition of the jurisdiction), was used to determine proper pay scale, identify highly competitive positions within the County, and to make strategic positioning recommendations. Evergreen Solutions completed the study by conducting a solution analysis, developing and administering an employee appeals process, developing and submitting final reports, and recommendations for compensation administration to ensure that staff could conduct audits/adjustments consistent with study methods until the next formal study is conducted.



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**Compensation Study  
Shelby County, Alabama**

Evergreen Solutions was engaged with Shelby County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job analysis to determine the hierarchy of jobs within the County for internal equity as well as a market salary survey with comparable local and private sector employers to determine external equity. Evergreen further reviewed and updated job descriptions.



**Classification and Compensation Study  
City of Miami Beach, Florida**

Evergreen Solutions was retained by the City of Miami Beach to conduct a Compensation and Classification Study for its 3,165 employees. Evergreen worked with the City to identify comparable cities and public sector organizations in South Florida to review the effectiveness of the City's current salary plan as it related to market competitiveness for attracting and retaining quality employees. The study was conducted in two phases. Phase 1 consisted of 300 positions (i.e., classifications) and Phase 2 also consisted of 300 positions. Therefore, only those employees that were covered by the 300 positions were included in each phase of the study.



**Classification and Compensation Study Services  
City of North Miami Beach, Florida**

Evergreen Solutions was retained by the City of North Miami Beach to provide Classification and Compensation Study Services to the Water Department. Evergreen worked with the City to: determine the classifications to include in the job analysis; reviewed the proposed organizational chart; linked proposed classifications to any current classifications; interviewed current water department leadership; documented specific classification challenges; selected peers class specifications to position creation; developed draft class specifications; assembled secondary data on classification plan ranges; determined the average actual compensation for classifications; slotted all classifications into the relevant pay plan; and estimated the cost to hire. **Note:** In 2021, Evergreen was hired to conduct a Classification and Compensation Study. Most recently, Evergreen was hired in 2023 to assess the cost of vacancies in the City.



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### **Classification and Compensation Study City of Fort Myers, Florida**

Evergreen Solutions was hired the City of Ft. Myers to conduct a Classification and Compensation Study for all employee groups (i.e., Police Union – Sworn only; Fire Union and General Union and Non-bargaining) consisting of 1,082 employees. The study will include comprehensive classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An evaluation of external equity including a salary survey of competing organizations will also be conducted. The project will conclude with a series of findings and recommendations designed to identify and recommend resolution of any inequities in the system and, if necessary, redesign the existing system in place for the City. **Note:** Evergreen was again hired in 2020 to conduct a Compensation Study for the City as well as a Staffing Study of the Police Department.



### **Classification and Compensation Study and Staffing Study City of Pensacola, Florida**

Evergreen Solutions was retained by the City of Pensacola to conduct a Classification and Compensation Study as well as a Staffing Study. For the staffing study Evergreen's consultants surveyed key staff and stakeholders to validate strategic needs and service areas, clarified duties and responsibilities, documented current functional areas, summarized major programs, answered specific questions regarding departmental organization and operations of the City to assure a valid understanding of the City; assigned functional areas and major programs to the specific strategic needs and service areas and weighted the allocated resources. Evergreen further identified jobs by level that fell outside of the estimated staffing thresholds; developed staffing model based on current strategic needs and peer thresholds; prepared summary of findings to the HR team; and identified areas needing improvement. **Note:** In 2019, Evergreen conducted a Compensation Study for the City.



### **Classification and Compensation Study City of Clearwater, Florida**

Evergreen Solutions was retained by the City of Clearwater to conduct a Classification and Compensation Study for 1,882 employees. Evergreen's consultants reviewed and evaluated existing classification/compensation system and benefits structures; developed a new methodology for pay structures and guidelines to address internal equity and external competitiveness (a salary survey or market study of benchmark jobs against comparable positions in other governments and relevant industries); and prepared updated pay plan schedules.



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### **Classification and Compensation Study City of Orlando, Florida**

Evergreen was hired in 2024 by the City of Orlando to conduct a Classification and Compensation Study of its more than 4,500 employees. Evergreen will examine internal equity to ensure that all positions are classification properly and that employees doing similar work are on the proper pay scale and will examine external equity to determine whether the City's salaries are competitive. Based on the results of the job analysis, Evergreen will update all job descriptions and the City's pay plans. **Note:** Evergreen previously worked with the City on more than five occasions providing a variety of human resource consulting, including compensation studies for various employee groups.



### **Compensation Study City of Boca Raton, Florida**

Evergreen was hired by City of Boca Raton to conduct a Compensation Study. Evergreen will conduct a comprehensive market-based survey and analysis of the City's current salary ranges and employee compensation for its 1,550 employees. Evergreen will also produce a pay plan for the City, develop strategic positioning recommendations and opportunities, and provide options to address salary progression and compression considering internal and external equity, and ensuring competitiveness within the market. Evergreen will prepare an implementation strategy and cost analysis for the pay plan and compensation recommendations.



### **Compensation, Classification, and Performance Management Study Manatee County, Florida**

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement.



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**Compensation and Classification Study Services  
Monroe County, Florida**

Evergreen was retained by Monroe County to conduct a Compensation and Classification Study for 265 non-union employees in 178 classifications as well as 124 union employees in 46 classifications who are represented by the Teamsters bargaining unit. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Evergreen's consultants compared the County's positions to other similar positions within other County departments to determine the relative value of each position to every other position in the County. Comparisons were made with regard to the actual work being performed and based on the current job description. In addition, positions were compared to other similar positions in other private and public sector organizations throughout the Florida Keys and South Florida. Characteristics such as size of the organization, geographic proximity, economic and budget characteristics, and other appropriate demographic data were taken into consideration when making comparisons. Evergreen's consultants also analyzed pay ranges in the public and private sector to determine the appropriate pay and benefit levels for all included jobs.

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished. **Note:** Evergreen was again retained in 2018 to conduct an update of the County's Classification and Compensation Plan to include fire and rescue. Most recently, Evergreen was retained in 2022 to conduct a Compensation Study.



**Compensation Study  
Orange County, Florida**

Evergreen Solutions was retained by Orange County to conduct a Compensation Study for non-represented staff. Evergreen's consultants conducted a salary survey to determine the County's market position and prepared a final report with cost analysis for implementation of all recommendations.



**Classification and Compensation Study  
Palm Beach County, Florida**

Evergreen Solutions was retained by Palm Beach County to conduct a Classification and Compensation Study, for more than 7,000 employees, in order to update the County's current classification and compensation structure. Evergreen performed the following tasks:



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- conducted a job analysis across the County to ensure job descriptions matched the duties performed by the employee;
  - provided an analysis of all positions' assigning an appropriate salary grade to ensure fairness and equity and included recommendations for all positions that were found to be above or below the assigned salary grade; and
  - conducted a market compensation analysis of salaries and wages of like or similar jobs of comparable Florida public organizations with similar position and organizational characteristics.



### **Classification and Compensation Study Pinellas County, Florida**

Evergreen Solutions was retained by Pinellas County to conduct a comprehensive classification and compensation study for 3,100 employees that included recommendations and suggestions for an implementation and maintenance process that effectively provided the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study was to have a credible classification and compensation plan that: allowed positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills and abilities to be classified appropriately; identified salaries for assigned duties; outlined promotional opportunities and possible compensation growth; identified pay differential between individual classifications; and identified relevant labor markets.



### **Classification and Compensation Study Analysis Suwannee County, Florida**

Evergreen was hired by Suwannee County to conduct a Classification and Compensation Study Analysis. Evergreen will perform the following tasks: provide a comprehensive evaluation of every job in the County; establish appropriate benchmarking standard and conduct salary surveys; analyze and recommend changes to the present compensation structure to meet market analysis; update job descriptions; recommend and identify a consistent and competitive market position; conduct a compression analysis to include any recommendations for implementation; and conduct a training program for the Human Resources staff.



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**Employee Classification and Compensation Study  
City of Hot Springs, Arkansas**

Evergreen Solutions was retained by the City of Hot Springs to conduct an Employee Classification and Compensation Study. Evergreen performed the following services:

- updated job descriptions to match distinguishing characteristics, essential job functions, minimum qualifications (knowledge, education, experience, skills, and abilities), working conditions (physical demands, work environment, other relevant circumstances.), and certifications and licenses.
- ensured the updated job descriptions were internally equitable and externally competitive;
- created new job descriptions where needed that were accurate and consistent with Fair Labor Standards Act (FLSA), Equal Employment Opportunity (EEO), and American with Disabilities Act (ADA) considerations;
- reviewed the wage, grade pay plan, provided feedback, and suggestions on modifications that were in line with the objectives outlined above;
- conducted a comprehensive base salary and benefits survey. The survey included benchmarking local market public sector jobs within the same essential duties and functions;
- provided a spreadsheet of all comparable cities based on a combination of factors including, resident population, geographic size, budget, and scope of city services;
- recommended an appropriate salary range for each position based on the classification plan, internal relationships, and equity; and
- identified potential pay compression issues and provided possible solutions.



**Classification and Compensation Study  
City of Seguin, Texas**

Evergreen Solutions was hired to assist the City of Seguin in designing and implementing a comprehensive classification and compensation plan for its workforce of 330 full-time employees. The scope of the project included two major components: (1) Working with a City management team to revise the existing pay plan and structures; and (2) Evaluating current salary structure and compensation levels for all regular, classified positions and recommending appropriate adjustments.



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Specifically, Evergreen's consultants reviewed the City's current classification/compensation plan; surveyed management and identified problem areas regarding the classification and compensation system; conducted a salary survey to ensure external equity; reviewed current policies and procedures; reviewed salary structure to determine appropriateness; and provided technical assistance and training to City staff to facilitate the implementation and the maintenance of the recommended system and procedures. **Note:** Evergreen Solutions was again retained by the City of Seguin in 2023 to conduct a Compensation Benchmarking and Structure Analysis. Evergreen examined the City's salaries against the market and provided recommendations to allow the City to be more competitive in recruiting and retaining talented employees.



### **Classification and Compensation Study and Staffing Analysis City of Harlingen, Texas**

Evergreen Solutions was retained by the City of Harlingen to conduct a Classification and Compensation Study and a Staffing Analysis. Evergreen's consultants performed the following tasks:

- conducted a comprehensive evaluation of every job class within the City to establish appropriate classification and pay grade assignments as well as pay ranges and step progressions within the ranges;
- conducted a compensation survey of the market including comparable Texas municipalities, and, appropriate private sector competitive employers;
- prepared a new salary structure based on the results of the survey and best practice research;
- analyzed and recommended changes to the present compensation structure to meet market analysis;
- reviewed current compensation plan (salary grade levels and steps) to better understand current challenges in recruiting and retaining employees;
- recommended and identified a consistent and competitive market position that the City could strive to maintain;
- recommended appropriate salary range for each position based on the proposed classification plan, the compensation survey results, internal equity and external parity;
- reviewed staffing levels and make recommendations;



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- prepared a new salary structure based on the results of the survey and best practices;
  - recommended implementation strategies including calculating the cost of implementing the plan;
  - identified any extreme current individual or group compensation inequities and provided a recommended corrective action plan and process to remedy these situations;
  - recommended and provided implementation strategies related to other key compensation practices, based on market demands; and
  - presented findings and recommendations to City Administration as well as the Harlingen City Commission at a regularly scheduled commission meeting.



**Classification and Compensation Study  
City of Farmers Branch, Texas**

Evergreen Solutions was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive. In addition to the salary survey, Evergreen Solutions conducted a benefits survey of market peers in order to compare the City's current benefits to those of its peers.



**Classification and Compensation Study  
City of Pflugerville, Texas**

Evergreen Solutions was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman).

Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost analysis for positions that would require adjustments.



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Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1<sup>st</sup> and 3<sup>rd</sup> quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval.



**Comprehensive Compensation and Benefits Study  
City of Rowlett, Texas**

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include “on call” pay. Evergreen’s consultants identified any weaknesses within the components of the City’s existing compensation package that would negatively impact the organization’s ability to attract and retain talented employees.



**Job Classification, Salary Survey, Compensation Plan Study Services  
City of Duncanville, Texas**

Evergreen Solutions was engaged with the City of Duncanville to provide professional Job Classification, Salary Survey, and Compensation Pay Plan Study Services that allowed the creation of a comprehensive job classification and compensation system and pay plans for employees within the City. Evergreen’s consultants reviewed and analyzed the City’s current structure and practices of job classifications and job descriptions including: conducting orientation sessions; providing questionnaires; conducting management and employee interviews; reviewing questionnaire responses with supervisory and management staff; performing a job analysis; and developing and/or revising job descriptions.

Evergreen prepared a customized market survey of salaries of the local and area municipalities that included all of the competitive markets where the city recruited employees. Evergreen established a system for an ongoing and easily understood maintenance of the new, or updated, pay plan that was easy for employees to understand and for managers to administer. The recommended pay plan effectively balanced market and internal equity, supported the classification system, and promoted an employee’s perception of organizational fairness and equity in the City. **Note:** Evergreen was again retained in 2022 to conduct a Compensation Study for the City.



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### **A Classification and Compensation Pay Plan City of Amarillo, Texas**

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan for 2,835 employees. Evergreen's consultants: reviewed the City's existing classification/ compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade. In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.



### **Human Resources Department Assessment (Classification and Compensation Services) City of Buda, Texas**

Evergreen was engaged with the City of Buda to conduct a Human Resources Department Assessment. Evergreen's consultants provided a job analysis questionnaire and procedures for future updating and new position creation and developed and fully defined a systematic procedure for evaluating positions using the "point factor method". A worksheet was developed for departments to request a job evaluation for upgrades within a position or for a new position for submission to Human Resources to ensure that job titles were consistently used on job descriptions and the pay plan.

Evergreen further created a new cost effective, affordable compensation structure and management plan that was systematically and equitably acknowledge and rewarded an employee's performance and skills. Evergreen designed a compensation program that included a description and justification of the pay philosophy, a completed pay structure, and rules for moving employees through the pay structure based on their increasing contributions in support of the City. Evergreen consultant's gathered actual salary data from market surveys, local governmental agencies, benchmarked cities, and other appropriate data, as deemed necessary. The recommended compensation structure included a proposed training/career progression plan, including documentation as appropriate, and a plan that rewards employee performance fairly and equitably, with measures that can be documented. **Note:** Evergreen was again hired in 2020 to conduct a Market Salary Update. Most recently, Evergreen was hired in 2023 to conduct a Compensation Study.



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**Classification and Compensation Study  
City of Lockhart, Texas**

Evergreen Solutions was retained by the City of Lockhart to conduct a classification and compensation study of its workforce. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed as well as benefits in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current system.



**Compensation and Classification Study  
City of Denton, Texas**

Evergreen Solutions was retained by the City of Denton to conduct a Compensation and Classification Study for its 1,542 employees. Evergreen worked with the City to develop a communication strategy and plan that allowed the City to be informed and be as transparent as possible and met and solicited feedback and input from different levels of the City including employees, department directors/managers, and executive management.

Evergreen conducted a comprehensive market compensation study and provided recommendations to ensure that the City's compensation system supports the City's mission, strategic objectives, and compensation philosophy. Evergreen further conducted a job analysis for up to 50 positions of concern to ensure appropriate pay grade classification and address internal equity concerns and will evaluate current pay grades, e.g. number of pay grades, including additions, deletions, and/or consolidations; appropriate spread between minimum and maximum of pay ranges, and recommend a strategy for improvements. Evergreen reviewed and recommended solutions for a pay for performance system/process.



**Classification, Compensation, and Benefits Study  
City of Portland, Texas**

Evergreen Solutions was engaged with the City of Portland (City) to conduct a Classification, Compensation and Benefits Study. Evergreen's consultants evaluated jobs within the City and the current pay and benefits structure. A market survey of salary and benefits was conducted among peers approved by the City. Based on the survey results, Evergreen made recommendations for changes to the current classification and compensation system, as well as provided a maintenance tool that the Human Resources Department to use to keep the system current and equitable. Training on this maintenance tool was also provided. **Note:** Evergreen was again hired in 2024 to conduct a Compensation Plan Update.



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**Compensation and Classification Study  
City of Beaumont, Texas**

Evergreen Solutions was retained by the City of Beaumont to conduct a Compensation and Classification Study for its 1,295 employees. Evergreen examined internal equity to determine whether positions were properly classified as well as external equity to determine whether the City was competitive in the market.



**Classification and Compensation Study  
City of Kingsville, Texas**

Evergreen Solutions was retained by the City of Kingsville to conduct a Classification and Compensation Study for 1,172 employees. Evergreen conducted a market salary survey and job analysis to determine internal and external equity and updated the City's personnel manual.



**Compensation and Classification Study  
City of Coppell, Texas**

Evergreen Solutions was engaged with the City of Coppell to conduct a Compensation and Classification Study. Evergreen reviewed existing job functions by position as they pertained to the current and recommended structure; examined current market position using peer comparisons; developed a comprehensive labor market salary survey for the North Texas region that included other local municipalities; analyzed existing internal hierarchy based on job relationships and essential functions, identified problem areas within the internal hierarchy system and proposed implementation methods to correct identified problems; developed a pay plan; reviewed and recommended assignments of all positions to an appropriate pay grade, as well as made recommendation(s) for corresponding education and experience requirements by classification; reviewed and revised job descriptions; and recommended implementation strategies including calculating the cost of implementing the study results.



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### **Comprehensive Compensation and Benefits Study City of Odessa, Texas**

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study for 1,140 employees. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include “on call” pay. Evergreen’s consultants identified any weaknesses within the components of the City’s existing compensation package that would negatively impact the organization’s ability to attract and retain talented employees.



### **Employee Compensation Consulting Services Fort Bend County, Texas**

Evergreen was retained by Fort Bend County to provide employee compensation consulting services for its 2,800 employees. Evergreen conducted the following tasks:

- reviewed current compensation plan including policy groups and salary structures;
- conducted Fair Labor Standards Act (FLSA) exempt/non-exempt status review of all positions;
- analyzed internal equity and possible compression issues;
- completed salary survey of City and County governments in the State of Texas as designated by the County;
- designed and executed a salary survey, analyzed results and made recommendations; and
- evaluated and determined each employee’s proper step placement on the newly approved salary grade structure.

**Note:** Evergreen was previously hired to conduct a similar study for the County.



### **Classification and Compensation Study Burnet County, Texas**

Evergreen Solutions was retained by Burnet County to conduct a Classification and Compensation Study. Evergreen’s consultants conducted a job analysis to determine the appropriate classification structure for the County and conducted an external salary survey to determine the County’s competitiveness with peer organizations in the labor market.



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**Compensation and Classification Study  
Brazoria County, Texas**

Evergreen was retained by the Brazoria County to conduct a Compensation and Classification Study. Evergreen developed a compensation program for the County, evaluated current pay grades, and developed a classification system to facilitate the ongoing compensation analysis. Evergreen assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen then developed multiple alternative recommendations and a communication plan. Finally, Evergreen reviewed and developed different policies procedures and proposed different recommendations. Note: Evergreen was again hired in 2025 to provide Salary Survey Consultant Services.



**Salary Compensation Study  
Hood County, Texas**

Evergreen Solutions was engaged with Hood County to provide an update of their classification and compensation system. Evergreen evaluated the current system, collected and reviewed current environment data, and evaluated and built the projected classification plan. Evergreen identified a list of market survey benchmarks and conducted a market survey. Evergreen's consultants provided the County with the external assessment summary, developed strategic positioning recommendations, and developed and submitted draft and final reports and recommendations for compensation administration. Additionally, Evergreen updated and rewrote job descriptions, as necessary, based on our recommendations.



**Classification and Compensation Study  
Blanco County, Texas**

Evergreen Solutions was retained by Blanco County to conduct a Classification and Compensation Study. Evergreen's consultant conducted a job analysis to determine the proper hierarchy of jobs within the County; conducted a salary survey and analysis to determine competitive market rates; updated job descriptions; and prepared a final report with cost analysis for implementation of all recommendations.



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### **Classification and Compensation Study Town of Prosper, Texas**

Evergreen was hired by the Town of Prosper to conduct a Classification and Compensation Study. Evergreen will perform the following tasks: review existing job classifications, and related background information, and propose recommended strategies for the Town; classify benchmark jobs and slot remaining jobs in appropriate classifications; review the current compensation plan; develop and conduct a comprehensive compensation and benefits survey; recommend implementation strategies to the Town; conduct a compression analysis to include any recommendations for implementation; and conduct a comprehensive training program for Human Resources staff to ensure that the staff can explain and administer the new system in the future.

**Note:** This project is nearing completion.



### **Comprehensive Compensation and Classification Study City of Santa Fe, New Mexico**

Evergreen Solutions was engaged by the City of Santa Fe to conduct a comprehensive compensation and classification study for all City 1,326 employees, including non-bargaining employees and those covered by collective bargaining agreements. Evergreen conducted orientations and focus groups with general employees, and interviewed department directors and other executive managers. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations as needed for revisions to the current classification structure.

Evergreen also worked with City Human Resources staff to conduct a comprehensive salary survey. The results were combined with the internal hierarchy analysis to generate recommendations for a comprehensive compensation and classification structure. Evergreen provided detailed recommendations for the implementation of a new structure and related employee salary adjustments. Evergreen also assisted the City with implementation of a revised performance assessment system which include training with supervisors and staff, and creating and distributing performance appraisal factor weighting forms. **Note:** Evergreen was again hired in 2023 to conduct a similar study for the City.



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### **Classification and Compensation Consulting Services City of Albuquerque, New Mexico**

Evergreen Solutions was retained by the City of Albuquerque to provide Classification and Compensation Consulting Services for 6,500 employees. Evergreen's consultants performed the following tasks:

- developed new classification and compensation structure (job families, pay plans, grades, steps as applicable) including recommendations for movement within structure;
- conducted a benchmarking analysis for placement of jobs within the new structure;
- assessed and provided recommendations associated with Premium Pay programs including but not limited to hiring incentives, seniority-based pay (longevity pay), shift differential, etc.;
- recommended resources needed to manage compensation program into future (i.e., technology and human capital);
- reviewed and updated job descriptions to accurately reflect essential functions, minimum qualifications for education and experience, required knowledge, skills and abilities, special requirements, and physical and environmental conditions;
- ensured position descriptions were in full compliance with all applicable federal, state, local statutes and regulations, including the Fair Labor Standards Act (FLSA) exemption status and Americans with Disabilities Act (ADA); and
- ensured position descriptions were assigned within the classification system, reflecting equitable placement between various position responsibilities.

**Note:** Evergreen also conducted a workforce study to determine the proper staffing of various departments. In addition, Evergreen previously conducted a classification and compensation study.



### **Salary and Benefits Survey City of Carlsbad, New Mexico**

Evergreen Solutions was retained by the City of Carlsbad to conduct a Salary and Benefits Survey. The study included the evaluation of 50 union positions as benchmarks against the private and public labor market in the State of New Mexico, and making recommendations to improve competitiveness in alignment with the City's strategic goals. Evergreen used private sector data from ERI for data that was unavailable from selected targets using a custom salary and benefits survey. In addition, Evergreen collected average actual salary data for the benchmarked positions. Evergreen's recommendations improved the competitiveness of the City and helped prepare the City for future recruitment challenges.



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**Classification Study and Compensation Survey  
City of Page, Arizona**

Evergreen Solutions was engaged with the City of Page to conduct a Classification Study and a Compensation Survey for all employees. As part of the study, Evergreen conducted orientation sessions, focus groups, and interviews. Employees completed a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A salary and benefits survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures were recommended to the City.



**Classification and Compensation Study (Included a Gender Equity Analysis)  
City of Prescott, Arizona**

The City of Prescott retained Evergreen Solutions to conduct a Classification and Compensation Study, including the development of a compensation philosophy, to design and implement a comprehensive total compensation plan and to classify all positions appropriately within the plan structure. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including salary and benefits surveys of competing organizations. The final report culminated in a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Prescott. **Note:** Evergreen also ensured that the solution that was recommended was equitable from a gender standpoint by doing an analysis of the data collected. Evergreen was again hired in 2025 to conduct a PTO Survey.



**Compensation Study  
City of Flagstaff, Arizona**

City of Flagstaff was hired Evergreen Solutions to conduct a Compensation Study for more than 1,000 employees. Evergreen's consultants performed the following tasks: evaluated the current broadband pay plan structure; evaluated the current skill-based pay plan, public safety, and general 2080 pay plan structures; conducted a market salary survey of at least five other local government and private sector peer organizations; developed a plan for the City's strategic improvement, including the identification of highly competitive positions within the City; and developed recommendations and guidelines for the continued administration and maintenance of the compensation system.



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**Classification, Compensation, and Benefits Study  
Yavapai County, Arizona**

Evergreen Solutions was engaged with Yavapai County to conduct a Classification, Compensation, and Benefits Study for its 1,750 employees. The purpose of the study was to develop a clear, equitable, consistent and competitive classification and compensation structure that fosters the retention and recruitment of qualified individuals while providing opportunities for growth and development within the County. Evergreen worked with the County to develop a compensation structure that was fair, equitable, and competitive with other local governments in the surrounding geographic market area from which the County recruits. Evergreen further worked with the County to develop a classification system that will facilitate ongoing compensation analysis and reporting based on similarly-situated employees, similar skills, qualifications, responsibilities, and pay, using job family grouping and EEO job categories. Evergreen provided the County with a tool that the HR department could use to continue that job evaluation process.



**Compression Analysis and Pay Equity Study  
Town of Prescott Valley, Arizona**

Evergreen was hired by the Town of Prescott Valley to conduct a Compression Analysis and Pay Equity Study. Evergreen reviewed the strengths and weaknesses of the current pay plan(s) and pay practices for the Town and discussed any pay compression issues that may exist and possible solutions. Evergreen conducted an internal pay equity analysis by race and gender to ensure fairness and compliance with relevant regulations and provided findings and recommendations to the Town to correct any inequities that might exist as well as strategies for promoting fairness and equity in the Town's compensation practices.



**Pay for Performance Study and Salary Survey  
City of Manitou Springs, Colorado**

Evergreen Solutions was retained by the City of Manitou Springs to develop a performance-based pay structure and conduct a salary survey. Evergreen made recommendations regarding enhancements needed to the City's current performance evaluation system and provided the City with a performance evaluation tool.



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**Compensation Study  
Grand County, Colorado**

Evergreen Solutions was retained by Grand County to conduct a compensation study. Evergreen performed the following tasks: reviewed current personnel practices and policies that impacted pay and performance; reviewed legal provisions and requirements, including statutory requirements that could impact the study; conferred with the County Manager, Elected Officials, Department Heads and Human Resources Director in order to review input regarding their views of compensation problems and needs, and identified specific areas of concern; reviewed County jobs in order to prepare an appropriate pay survey and fringe benefit questionnaire; prepared a survey tool that sought entry level, mid-point and maximum pay for each key class included; performed analysis of pay and benefit data provided by peer organizations; prepared recommended pay grade and range schedules and assignments to pay grades for each class of work; determined appropriate internal relationships of the classes based upon classification factors; and developed a salary schedule or schedules that met the needs of the County's compensation program and related to the County's labor market.



**Compensation and Classification Study  
Garfield County, Colorado**

Evergreen was retained by Garfield County to conduct a Compensation and Classification Study for the County Administration's and Elected Officials' and 356 full time employees. Evergreen gave specific recommendations to Garfield County in relation to the County's market position and an implementation plan; created and administered a custom survey to provide a comprehensive review of the external labor market for identified benchmark jobs; integrated relevant survey data; provided an analysis of actual pay to the external labor market and identified the County's overall market position; revised and updated salary grade structures based on total compensation philosophy; prepared implementation options and guidance on the implementation of findings and recommendations; developed and implemented a job evaluation and classification system; provided a comprehensive review of job descriptions and an analysis of the compensable factors of the job(s); identified key job families; recommended job title consolidation; identified potential pay compression issues and provided recommendations for solutions; and prepared implementation options and guidelines on the implementation of findings and recommendations.



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**Classification and Compensation Study (Included Benefits Survey)  
Ouray County, Colorado**

Evergreen Solutions was engaged with Ouray County to conduct a Classification and Compensation study, including wages and benefits, for full-time and part-time employees of Ouray County. A job analysis was conducted using existing job descriptions to determine the best classifications for the work performed. Evergreen recommended the deletion of outdated or unnecessary jobs descriptions as well as the revision to current positions, if needed. In addition, a salary survey was conducted to ensure external market equity by comparing Ouray County to other county governments, local municipalities and local businesses as appropriate. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



**Compensation Study  
City of Long Beach, California**

Evergreen Solutions was retained by the City of Long Beach - Long Beach Management Association to conduct a Compensation Study. Evergreen conducted a salary survey to determine whether the union positions within the City's Fleet Services Bureau were competitive in the market.



**Comprehensive Classification and Compensation Study  
City of Camarillo, California**

Evergreen Solutions was retained by the City of Camarillo to conduct a Comprehensive Classification and Compensation Study. The study assessed the current classification schedule and pinpointed needed changes in job duties, titles, salaries, and benefits. The study also addressed the internal relationships within the organization to help determine proper equity in the classification and compensation study and also to help determine whether the existing salary and compensation schedule was competitive and consistent with comparable employers. In the end, Evergreen provided a defensible and technically sound basis for compensating employees within the City. Evergreen also evaluated the City's current pay for performance plan and provided alternative compensation recommendations, including Cost of Living Arrangement structures. Up to 10 single job audits was also conducted.



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**Classification and Compensation Study  
City of Fresno, California**

Evergreen was retained by the City of Fresno to conduct a Classification and Compensation Study. Evergreen reviewed and evaluated the City's existing classification system and compensation structure for more than 1,000 employees, surveyed fifteen agencies mutually agreed-upon between Local 39 and the City, reviewed classification specifications, salaries and other benefits, distributed and reviewed position description questionnaires and interviewed employees and management personnel, drafted and/or modified classification specifications, made recommendations on salaries, and provided overall subject matter expertise and recommendations on a classification and compensation structure that meets the City's prime objective of attracting and retaining qualified talent to classifications within this bargaining unit.



**Classification and Compensation Study  
City of Yucaipa, California**

Evergreen Solutions was retained by the City of Yucaipa to conduct a Classification and Compensation Study. Evergreen reviewed current class specifications to ensure they were in line with current changes and requirements in the law and identified class specifications that needed to be updated to reflect current job duties and requirements of the position, including physical requirements and essential job functions that comply with the Americans with Disabilities Act (ADA). In addition, Evergreen reviewed the City's current organizational structure and provided recommendations to ensure it is efficient and effective.



**Classification and Compensation Study  
City of Thousand Oaks, California**

Evergreen was hired to conduct a Classification and Compensation Study for the City of Thousand Oaks. The purpose of the study was to conduct a comprehensive evaluation and analysis of the City's current compensation structure and practices as the City desired a competitive, equitable, sustainable structure that would be aligned with the labor market to support the City in providing the highest levels of service to our community by attracting, retaining, and motivating a talented and dedicated workforce. Evergreen presented a Comprehensive Classification and Compensation Study Report, updated job descriptions and classifications, made salary structure adjustment recommendations and created an implementation plan outlining next steps and timelines for the City.



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**Comprehensive Compensation Study  
City of Crescent City, California**

Evergreen Solutions was hired by the City of Crescent City to conduct a Comprehensive Compensation Study. Evergreen performed a comprehensive review of the City's current compensation and classification system which included: reviewing job descriptions; identifying and making recommendations for directly comparable and competitive agencies; completing an internal salary relationship analysis; developing externally competitive and internally equitable salary recommendations for each class; and developing an implementation plan for the study results.



**Consultant Services for a Study of the City's Compensation Plan and Benefits  
City of Sanger, California**

Evergreen Solutions was hired by the City of Sanger to provide Consultant Services for a Study of the City's Compensation Plan and Benefits. Evergreen will perform the following tasks: reviewed current compensation practices and related issues; reviewed current listing of comparable cities; collected salary survey data; met with Department Directors; held orientation and briefing sessions with employees; conducted an internal salary relationship analysis; provided recommendations for updating the City's classification and compensation plans; reviewed and revised job descriptions; and trained City staff in the methodology used.



**Classification and Compensation Study Services  
City of Santa Ana, California**

Evergreen was hired by the City of Santa Ana to conduct a Classification and Compensation Study for its more than 1,675 employees. Evergreen provided recommendations for updating the City's job architecture; developed compensation strategies to withstand minimum wage increases while maintaining appropriate pay differentials; created recommendations for appropriate labor markets; and prepared a plan for the ongoing internal administration and maintenance for the compensation plan.



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### Competency Model, Classification Analysis, & Compensation Study City of West Hollywood, California

Evergreen was hired by the City of West Hollywood to conduct a Competency Model, Classification Analysis and a Compensation Study. Evergreen drafted a competency bank and provided the City a report and analysis of findings of the completed competency bank. Evergreen also conducted a comprehensive salary, benefits and total compensation survey of similar jobs with comparable public agencies in our labor market, reviewed the City's classification structure, surveyed comparable government agencies and provided a comparison of salary, benefits and total compensation. At the end of the study, Evergreen provided recommendations to the City's Human Resources staff and presented results.



### Total Compensation Study City of Moorpark, California

Evergreen was hired by the City of Moorpark to conduct a Total Compensation Study. The goal of this study is to ensure that employee compensation remains competitive and that recent organizational changes as well as the effects of changes in retirement and health insurance costs are taken into consideration. Evergreen will ensure that positions performing similar work with the same level of complexity, responsibility and knowledge, skills and abilities are classified together. Evergreen will also provide salaries commensurate with assigned duties, clearly outline promotional opportunities, and provide recommendations on staff alignment, reporting relationships, and organizational structure. **Note:** This project is nearing completion.



### Classification and Compensation Study Inyo County, California

Evergreen was retained by Inyo County to conduct a Classification and Compensation Study. Evergreen performed the following tasks: ensured the County remains competitive in the job market when compared to similar organizations throughout California; assessed classifications relative to the requirements of "Exempt" and "Non-Exempt" status pursuant to the criteria of the Fair Labor Standards Act; recommended revisions to internal total compensation relationships that were consistent, uniform, and sustainable for the County in consideration of its budget constraints; identified positions in the County for which there were no genuine comparable positions elsewhere within comparable agencies and made recommendations to determine fair compensation; provided modern job descriptions for certain positions; ensured equitable pay relative to other County positions; and provided total compensation recommendations to the County based upon internal and external total compensation relationships.



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**Classification and Compensation Study  
Calaveras County, California**

Evergreen Solutions was retained by Calaveras County to conduct a Classification and Compensation Study. Evergreen completed the following tasks: reviewed and compared current salaries of identified benchmark classifications; compared current salaries on the identified benchmark classifications; reviewed and compared the County's current benefit packages; recommended where the County salary structure should be to maintain a competitive presence, including surrounding counties, not comparable in sizes, but located in surrounded areas; and reviewed the County's internal relationships among benchmark classes and related classifications. **Note:** Evergreen previously conducted an organizational structure and staffing analysis of the Health and Human Services Agency and is currently conducting a compensation review for elected officials.



**Classification and Compensation Study  
City of Boulder City, Nevada**

Evergreen Solutions was engaged with the City of Boulder City to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job evaluation, classification review, and developed a compensation system for all positions and job classifications in order to make recommendations regarding the appropriateness, internal equity, and external competitiveness of the City's classification and compensation plans. Evergreen developed an updated and well-structured classification system as well as classification descriptions for all positions that is legally compliant (including Fair Labor Standards Act (FLSA) and Americans with Disabilities Act (ADA) requirements), internally aligned, reflective of contemporary standards, and accurately reflected current roles, responsibilities, duties, and qualifications. The study also reviewed the City's compensation structure by conducting a market salary survey using comparator agencies. The compensation study contained specific recommendations regarding the integration of all classifications into a clear compensation structure, with the goal of developing a clearly designed, internally equitable format that is flexible for career opportunity and future growth.



**Classification, Compensation, and Benefits Study  
Ogden City Corporation, Utah**

Evergreen Solutions was engaged with Ogden City Corporation to conduct a Classification, Compensation and Benefits Study for its 1,250 employees. The goals of this study were to ensure that job descriptions accurately reflect actual duties and maintain compensation levels that are both internally and externally equitable.



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Evergreen Solutions worked with Ogden City Corporation throughout four project phases that involved:

- conducting a job analysis, including building a classification plan;
- documenting a compensation philosophy;
- reviewing and analyzing the City's total compensation plan, including a market salary and benefits survey; and
- providing a comprehensive report containing recommendations, an implementation approach, and guidelines for maintaining
- classification and compensation policy updates and changes.



#### **Classification and Compensation and Equal Pay Study City of Albany, Oregon**

Evergreen Solutions was retained by the City of Albany to conduct a Classification and Compensation and Equal Pay Study. Evergreen's consultants reviewed current job descriptions and compensation structures to determine the need for modifications to assure external competitiveness and internal equity by performing the following tasks:

- reviewed current job descriptions to analyze knowledge, ability, education, experience, relevance, and hierarchical consistency;
- developed, distributed, and analyzed job specific questionnaires, as needed, and conducted in-person interviews of select staff to complete analysis;
- proposed, where appropriate, broad-banding of classifications, or combining classifications into a series, if beneficial to achieve alignment of similar positions;
- recommended additions, deletions, or modifications to existing classifications and made FLSA determinations (exempt or non-exempt status) for positions;
- surveyed comparator jurisdictions for both wages and total compensation;
- analyzed results and developed appropriate pay structures for City taking into account compression and internal equity;
- conducted equal pay analyses of recommended pay structures that complied with House Bill (HB) 2005 and its implementing administrative rules; and



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- trained City HR staff on the methodology used to assess job classifications in order to maintain internal equity when adding, deleting, or modifying jobs in the future.



**Compensation Study  
City of Bend, Oregon**

Evergreen Solutions was retained by the City of Bend to conduct a Compensation Study. The objectives of the study were to assist the City in conducting a compensation study for all COBEA represented classification descriptions as prescribed by guidelines; and assisted the City with conducting a compensation study for all non-represented classification descriptions.



**Professional Technical and Expert Services  
City of Portland, Oregon**

Evergreen was retained by the City of Portland to provide Professional Technical and Expert Services for its more than 3,000 employees. Evergreen reviewed positions and classifications represented by a collective bargaining agreement, as well as newly represented and non-represented classifications. Evergreen developed recommendations for the most effective classification structure, revised existing classifications and/or the creation of new ones, as well as made recommendations to align individual incumbents to the most appropriate classification. **Note:** Evergreen was again hired in 2025 to conduct a similar study for general employees.



**Compensation and Classification Study  
Columbia County, Oregon**

Evergreen Solutions was retained by Columbia County to conduct a Compensation and Classification Study. Evergreen's consultants worked with the Compensation Study Committee (CoSC) to develop a compensation system for the County, evaluated current pay grades, conducted an equal pay analysis in compliance with the Oregon Equal Pay Law, and developed a classification system to facilitate the continued administration of the compensation analysis. Evergreen's consultants also assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen then developed multiple alternative recommendations and a communication plan as well as reviewed and developed different policies procedures and proposed different recommendations.



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### **Classification and Compensation Study City of Ridgefield, Washington**

Evergreen Solutions was engaged with the City of Ridgefield to conduct a Classification and Compensation Study. The City had desired to maintain an internally and externally equitable, yet market competitive, classification and compensation plan. The City had strived to competitively recruit and retain employees who would provide the best service to the community. The City had not conducted an in-depth review of the classification and compensation structure since 2015-16 and since that time had grown from 37 to 52 FTE's, including seven (7) new classifications. In the end, Evergreen provided recommendations to update the City's classification and compensation structure in order to better retain and recruit qualified employees. **Note:** Evergreen was again hired in 2024 to conduct a Classification and Compensation Plan Update.



### **Job Classification Market Study City of Bellingham, Washington**

Evergreen was hired by the City of Bellingham to conduct a Job Classification Market Study. Evergreen performed the following tasks: performed a market pay evaluation; collected salary and benefit data for a total compensation analysis and reviewed job descriptions for all benchmark positions; performed a job analysis of all bargaining unit classifications; conducted job analysis interviews; analyzed the internal pay relationship between positions; produced recommendations on strategy options for more effective management of compression issues; and developed tools and guidelines and provided necessary instruction to the City.



### **Job Analysis City of Washougal, Washington**

Evergreen Solutions was engaged with the City of Washougal to conduct a job analysis of select positions (seven) to include in the City's revised pay plan. **Note:** Evergreen continues to provide job analyses to the City on an as needed basis.



### **Total Compensation Study Spokane County, Washington**

Evergreen Solutions was retained by Spokane County to conduct a Total Compensation Study for more than its more than 2,000 employees. Evergreen reviewed total Compensation (compensation and benefits) for 225 regular, full-time positions and recommended possible wage adjustments that align with the County's compensation philosophy. Additionally, Evergreen compared the County's benefits package with those offered in the same local market identified in the pay analysis. **Note:** Evergreen was hired again in April of 2020 to conduct a Classification Study for the County.



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*Section 2.0*  
*Project Team*



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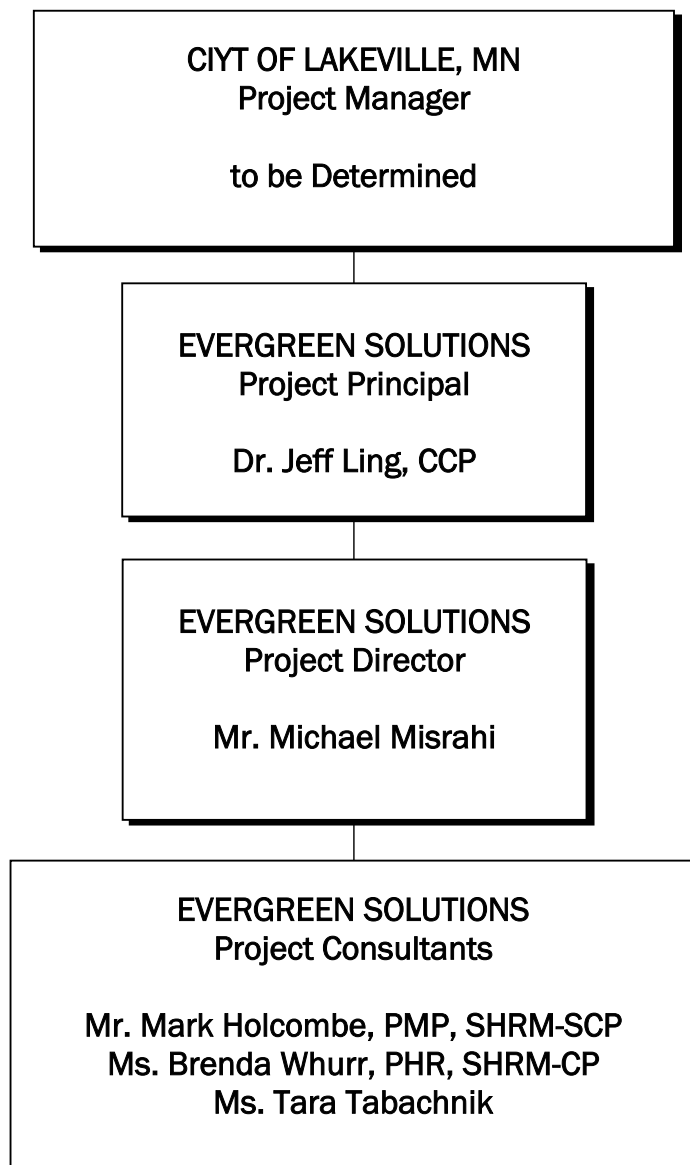
## 2.0 Project Team

In this section, we include the qualifications of our proposed project team through summary resumes. Detailed resumes are available upon request.

### 2.1 Proposed Project Team

Exhibit 2-1  
Proposed Project  
Management  
Organization and  
Personnel  
Assignments

Exhibit 2-1 reflects our proposed project management and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Compensation Study so that there will be no confusion as to who is responsible for any aspect of this engagement with the City of Lakeville.



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**City of Lakeville Project Manager.** With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The City's Project Manager (CPM) will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the CPM and all project deliverables will be filtered through the CPM throughout the duration of the project.

**Evergreen Solutions' Project Principal.** Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, typically the President. The Project Principal will have contractual authority over the contract and will be our top level of project responsibility.

**Evergreen Solutions' Project Director.** Evergreen Solutions designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the CPM. The Project Director will have the most frequent contact with the City and will assign project activities to the Project Consultants and will ensure that deliverables are met within specified timelines.

**Evergreen Solutions' Project Consultants.** Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will review pay plans, conduct a salary survey, and prepare draft and final reports.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Our firm is proposing an exceptional team of consultants who have worked together on many similar projects. We always make sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of Compensation Study for the City of Lakeville.

## 2.2 Key Personnel

### Project Principal Dr. Jeff Ling, CCP

The following paragraphs provide summaries of each team member's qualifications and experience related to his/her role in this engagement.

Dr. Jeff Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector Evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.



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Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with includes:

- **Compensation/Classification** – He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal or Project Director for more than 1,500 public sector projects related to Classification and/or Compensation.**
- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.

**Project Director  
Mr. Michael Misrahi**

Mr. Michael Misrahi is a Project Manager who has been with the firm for more than eight years. During that time, he has served as a Consultant or Project Lead on more than 100 HR consulting projects. He has extensive experience in the development and modification of compensation and classification plans, policies, and practices for organizations varying in size from a few dozen employees to several thousand.



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Mr. Misrahi also served as the Compensation Manager at the University of Central Florida, where he oversaw a team of compensation analysts, and was responsible for administering the University's compensation structure for over 10,000 employees.

A sample of some of Mr. Misrahi's public sector projects include: a Review of the Classification and Compensation System for the City of Rochester, MN; a Compensation Study for the County of Montgomery, PA; a Classification and Compensation Study for Madison County, TN; a Compensation Salary Study Review for Davidson Transit Organization, TN; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Comprehensive Compensation Study for Shawnee County, KS; a Compensation Study for the City of Shawnee, KS; a Classification, Compensation, and Benefits Survey for Kent County Levy Court, DE; a Classification and Compensation Study for Frederick County, MD; a Classification and Compensation Study for Howard County, MD; an Employee Compensation and Classification Study for the City of Takoma Park, MD; a Job Classification and Compensation Study for the City of Baltimore, MD; a Compensation Study for the County of York, VA; a Classification and Compensation Study for Loudoun County, VA; a Classification and Compensation Plan for the City of Petersburg, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Salary Survey for the State Employees Association of North Carolina (SEANC); a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Simple Comparison and Blended Market Comparison/Competency Market Analysis for the North Carolina League of Municipalities; a Simple Comparison and Blended Market Comparison/Competency Market Analysis for the North Carolina League of Municipalities; Organizational Assessment of the HR Department for York County, SC; Compensation Study for Laurens County, SC; a Classification, Compensation and Benefits Study for the Town of Kiawah Island, SC; a Classification and Compensation Study for the City of Douglasville, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Staffing Study for the City of Fayetteville, GA; a Compensation Study for Osceola County, FL; a Compensation Study for Santa Rosa County, FL; a Pay and Classification Study for Bay County, FL; a Compensation and ERP Study for Miami-Dade County, FL; a Pay and Classification Study for Gulf County, FL; a Compensation Study for the Tax Collector's Office of Indian River County, FL; a Salary Study for Highlands County, FL; a Compensation Study for Brevard County, FL; a Compensation Study for Sarasota County, FL; a Salary and Benefits Review for Hernando County, FL; a Classification and Compensation Study for Pinellas County, FL; a Classification and Compensation Study for Palm Beach County, FL; a Pay and Classification Study for Martin County, FL; a Classification and Compensation Study for Franklin County, FL; a Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Compensation Study for the City of Fort Myers, FL; Classification and Compensation Services for the City of Dunedin, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for the City of Doral, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Benefits Study for the City of Key West, FL; a Compensation and Benefits Study for the City of St. Cloud, FL; a



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Classification and Compensation Study for the City of Sebring, FL; a Compensation Study for the City of Key West, FL; a Compensation and Classification Study for the City of Sarasota, FL; Compensation Consultant Services for the City of Coral Springs, FL; an Employee Engagement Survey for the City of Daytona Beach, FL; a Compensation and Classification Study for the Town of Davie, FL; a Review of Compensation for the Fire Department for Sarasota County, FL; a Classification and Compensation Study for Monroe County and the Monroe County Sheriff's Office, FL; a Staffing Study for the Fort Myers Police Department, FL; a Staffing Study for the Leon County Sheriff's Office, FL; a Classification and Compensation Study for the Leon County Sheriff's Office, FL; a Classification and Compensation Study for the Broward County Sheriff's Office, FL; a Pay, Compensation, and Classification Study for Community Action Stops Abuse, FL; a Compensation and Classification Plan Update for the Florida League of Cities; an Organizational Study for the Florida Clerks of Court Operations Corporation (FCCOC); an Employee Compensation and Classification Study for the Florida Court Clerks and Comptrollers (FCCC); a Classification and Compensation Study for the Wakulla County Board of County Commissioners, FL; a Classification and Compensation Study for the Hillsborough County Clerk of Court and Comptroller, FL; a Compensation Study for Naples Airport Authority, FL; a Classification and Compensation Study for Ouray County, CO; a Compensation Study for Grand County, CO; a Compensation and Classification Study for Garfield County, CO; Classification and Compensation Consulting Services to the City of Albuquerque, NM; a Wage and Compensation Study for Jefferson County, TX; a Salary Survey for the City of Port of Bay City, TX; a Classification and Compensation Study for the City of Cleburne, TX; a Pay for Performance and a Salary Survey for City of Mont Belvieu, TX; a Compensation and Classification Study for the City of Pearland, TX; a Comprehensive Compensation and Benefits Study for the City of Sachse, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Staffing Study for the City of Pflugerville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; a Classification and Compensation Study for the City of Seguin, TX; a Comprehensive Compensation and Benefits Study for City of Rowlett, TX; a Compensation and Classification Study for the Brazos River Authority, TX; a Compensation Study for Brazos River Authority, TX; a Compensation and Classification Study and Organizational Review of the RSMU Department for Brazos River Authority, TX; Compensation Consultant Services to Dallas Area Rapid Transit, TX; a Salary Analysis for Fort Worth Housing Solutions, TX; a Compensation and Classification Study Update for Denton County Fresh Water Supply District No. 6 and Denton County Fresh Water Supply District No. 7, TX; a Classification and Compensation Study for the City of Prescott, AZ; a Compensation Study for Town of Sahuarita, AZ; a Compression Analysis and Pay Equity Study for the Town of Prescott Valley, AZ; a Wage Compensation Study Services for Northern Arizona Intergovernmental Public Transportation Authority; a Classification and Compensation Study/Organizational and Operational Review for the City of Beaumont, CA; a Competency Model, Classification Analysis, & Compensation Study for the City of West Hollywood, CA; and a Classification and Compensation/Benefits Study for San Luis Obispo Regional Transit Authority, CA.



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**Project Consultant  
Mr. Mark Holcombe,  
SHRM-SCP, PMP**

Mr. Misrahi has an MBA and a Bachelor's degree in History from Florida State University.

Mr. Mark Holcombe has more than ten years of management and consulting experience and is recognized as a certified Project Management Professional (PMP) and a SHRM Senior Certified Professional (SHRM-SCP). He has been at Evergreen Solutions more than eight years, during which time he has been promoted through the organization and has led Evergreen's largest local government practice for the past two years. His academic foundation in micro and macroeconomics, combined with his experience leading a business before joining Evergreen, has given him significant experience in leading teams, modeling and controlling costs, and working to provide a product that meets the needs of all stakeholders. This experience has been instrumental in ensuring that his team is able to translate complex and comprehensive data into actionable insights for his clients.

At Evergreen, Mr. Holcombe's emphasis has been in compensation and classification studies of varying size and scope. He has led projects with cities and counties, colleges and universities, K-12 school districts, transportation organizations, and statewide government organizations. Some of his principal areas of expertise are:

- Refining client compensation and classification systems, ensuring alignment with HR best practices and meeting specific client needs.
- Leading initiatives focusing on market competitiveness for large and complex public sector clients.
- Constructing reports and visuals to share complex findings in an approachable way.
- Crafting complex cost models to facilitate accurate budgetary projections for clients.
- Assessing market data, synthesizing information from a variety of sources to provide comprehensive compensation insights.
- Redesigning classification systems to modernize and streamline titling conventions for entire organizations or within job families.
- Conducting staffing analyses to determine efficiency.
- Conducting reviews centered around gender and racial equity in compensation systems, ensuring their adherence to local, state, and federal laws and regulations.

A sample of some of the public sector projects that Mr. Holcombe has been involved with include: a Review of the Classification and Compensation System for the City of Rochester, MN; a Classification and Compensation Study for Jasper County, MO; a Compensation Study for the City of Dardenne Prairie, MO; a Compensation Study for the City of Fulton, MO; a Compensation Study for the City of Jefferson, MO; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Classification and Benefits Study for the City of St. Peters, MO; a Compensation Study for Sedgwick County, KS; a Comprehensive Compensation Study for Shawnee County, KS; a Classification and Compensation Study for the City of Leawood, KS; a Salary Study for the City



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of Leawood, KS; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Compensation Study for the City of Shawnee, KS; a Classification and Compensation Study for the North Dakota Court System, ND; a Compensation and Classification Review for the City of Cambridge, MA; a Compensation Study for the Architect of the Capitol, DC; a Compensation Consultation Services for Genesee County, NY; an Employee Compensation Study for Livingston County, NY; an Employee a Compensation Study for the County of Montgomery, PA; a Job Classification Study and Analysis for Jefferson County, TN; a Classification and Compensation Study for Madison County, TN; Classification and Compensation Consulting Services to the City of Clarksville, TN; a Classification and Compensation Study for the City of Cleveland, TN; a Compensation Study for the City of Seaford, DE; a Classification and Compensation Study for the City of Milford, DE; a Compensation Study for Allegany County, MD; a Classification and Compensation Study for Frederick County, MD; a Classification and Compensation Study for Harford County, MD; a Classification Study for Talbot County, MD; a Compensation Study for the City of Baltimore, MD; an Employee Compensation and Classification Study for the City of Takoma Park, MD; a Compensation and Classification Study for Bedford County, VA; a Compensation Consulting Services for Chesterfield County, VA; a Market Salary Survey for Chesterfield County, VA; a Classification and Compensation Study for Loudoun County, VA; a Compensation and Classification Study for Mecklenburg County, VA; a Classification and Compensation Study for the City of Falls Church, VA; a Classification and Compensation Study for the City of Hopewell, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Classification and Compensation Study for the City of Norfolk, VA; a Classification and Compensation Plan for the City of Petersburg, VA; a Classification System and Pay Plan Development Study for Franklin County, NC; a Comprehensive Classification and Compensation Study for the City of Fayetteville, NC; a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Pay and Classification Study for Dorchester County, SC; a Compensation Study for Laurens County, SC; an Organizational Assessment of the HR Department for York County, SC; a Classification and Compensation Study for the City of Mauldin, SC; a Wage Study for the Town of Mount Pleasant, SC; a Classification and Compensation Study for Barrow County, GA; a Compensation Study for the City of Commerce, GA; a Compensation Pay Study for the City of Douglasville, GA; a Classification and Compensation Study for the City of East Point, GA; a Classification, Compensation and Benefits Study for the City of East Point, GA; a Staffing Study for the City of Fayetteville, GA; a Comprehensive Position Classification and Compensation-Benefits Study and Analysis for the City of Kennesaw, GA; a Classification and Compensation Study for the City of Milton, GA; a Classification and Compensation Study for the City of Rome, GA; a Classification and Compensation Study for the City of South Fulton, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Classification and Compensation Study for the City of Union City, GA; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for the Alabama Port Authority, AL; a Compensation Study for Brevard County, FL; a Classification and Compensation Study for DeSoto County, FL; a Classification Study for Manatee County, FL; a Compensation Study for Manatee County, FL; a Compensation Study for Monroe County, FL; a Classification and Compensation Study for Palm Beach County, FL; a Classification and Compensation Study for Pinellas County, FL; a Classification and Compensation Study Analysis for Suwannee



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County, FL; a Compensation Study for the City of Boca Raton, FL; a Compensation Study for the City of Fort Myers, FL; a Compensation Study for the City of Key West, FL; a Compensation and Benefits Study for the City of New Smyrna Beach, FL; a Compensation Study for the City of North Miami, FL; a Classification and Compensation Study for the City of North Miami Beach, FL; a Compensation Study for the City of Miami Springs, FL; a Compensation Study for the City of New Port Richey, FL; a Compensation Study for the City of Zephyrhills, FL; a Compensation and Classification Study for the Town of Davie, FL; a Compensation Study for Aransas County, TX; Salary Survey Consulting Services for Brazoria County, TX; a Wage and Compensation Study for Jefferson County, TX; a Classification and Compensation Study and Analysis for Matagorda County, TX; a Classification and Compensation Study for Randall County, TX; a Classification and Compensation Study and Analysis for Taylor County, TX; a Classification and Compensation Study and Analysis for Waller County, TX; a Classification and Compensation Study for the City of Alpine, TX; a Compensation Study for the City of Big Spring, TX; a Compensation Study for the City of Brownsville, TX; a Compensation Study for the City of Buda, TX; a Classification and Compensation Study for the City of Cleburne, TX; a Compensation and Benefits Survey and Analysis for the City of Deer Park, TX; a Compensation and Classification for the City of Denton, TX; a Compensation Study for the City of Duncanville, TX; a Compensation and Benefits Study for the City of Fair Oaks Ranch, TX; a Compensation/Salary Survey for the City of Freeport, TX; a Compensation Study for the City of Galveston, TX; a Classification and Compensation Study for the City of Kingsville, TX; a Compensation Study and FSLA Review for the City of La Porte, TX; a Compensation and Classification Study for the City of League City, TX; a Comprehensive Market Salary and Benefits Study for the City of Missouri City, TX; a Classification and Compensation Study for the City of Mont Belvieu, TX; a Classification and Compensation Study for the City of Montgomery, TX; a Compensation Study for the City of Wharton, TX; a Comprehensive Classification and Compensation Study for the City of Odessa, TX; a Compensation and Benefits Study for the City of Portland, TX; a Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; an Equity and Compensation Study for the City of Three Rivers, TX; a Classification and Compensation Study for the Town of Prosper, TX; a Compensation and Classification Study for the Woodlands Township, TX; a Classification and Compensation Study/Gender Pay Equity Analysis for the City of Santa Fe, NM; a Classification and Compensation Study for the City of Albuquerque, NM; a Classification, Compensation, and Benefits Study for Yavapai County, AZ; A Compensation Study for the City of Flagstaff, AZ; a Classification and Compensation Study for the City of Prescott, AZ; a PTO Survey for the City of Prescott, AZ; a Compression Analysis and Pay Equity Study for the Town of Prescott Valley, AZ; a Compensation and Classification Study for Garfield County, CO; a Compensation Study for Grand County, CO; a Classification and Compensation Study for Inyo County, CA; a Classification and Compensation Study Services for the City of Bell Gardens, CA; a Comprehensive Classification and Compensation Study for the City of Camarillo, CA; a Comprehensive Compensation Study for the City of Crescent City, CA; a Classification and Compensation Study/Organizational and Operational Review for the City of Beaumont, CA; a Classification and Compensation Study for the City of Fresno, CA; a Total Compensation Study for the City of Moorpark, CA; a Comprehensive Classification and Compensation Study for the City of Riverbank, CA; a Consultant Services for a Study of the City's Compensation Plan and Benefits for the City of Sanger,



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CA; a Classification and Compensation Study for the City of Thousand Oaks, CA; a Classification and Compensation Study for the City of West Hollywood, CA; a Classification and Compensation Study Services for the City of Santa Ana, CA; a Classification and Compensation Study for the City of Yucaipa, CA; a Compensation Study for the City of Bend, OR; a Professional Technical and Expert Services for the City of Portland, OR; a Job Classification Market Study for the City of Bellingham, WA; and a Classification and Compensation Study for the City of Ridgefield, WA.

Mr. Holcombe holds a Bachelor's Degree with a dual major in Economics and Criminology from Florida State University. He is a certified Project Management Professional (PMP) and holds a SHRM-SCP certification.

**Project Consultant  
Ms. Brenda Whurr,  
PHR, SHRM-CP**

Ms. Brenda Whurr, PHR, SHRM-CP, is a Senior Consultant with Evergreen who has more than 15 years of human resource management experience. As a former HR Director in both Florida and North Carolina, she led an HR team with onboarding, payroll processing and day-to-day employee issues; administered leave and workers' compensation; worked with leadership on recruiting strategies and employee relations issues; coordinated open enrollment and other benefits programs; implemented policies and procedures to assist in the transformation of a small company approach to a larger, multi-location company; transitioned the HR Department into a paperless document storage system; developed and implemented a recruiting program; and led initiatives for a Wellness Program and Family Fun Day to increase employee engagement.

A sample of some of the public sector projects that Ms. Whurr has been involved with include: a Classification and Compensation Study for the City of Portland, ME; a Classification and Compensation Review for the City of Cambridge, MA; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification and Total Compensation Study for the Town of Plainville, CT; a Classification and Total Compensation Review for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Onslow County, NC; a Compensation and Classification Study for the Town of Wendell, NC; an Employee Compensation and Classification Study for the City of Greenwood, SC; Classification and Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Wage and Compensation Study for Folly Beach, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study and Analysis for the City of Riverdale, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for the City of Duluth, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study and Analysis for



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the City of Lawrenceville, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Vienna, GA; a Classification and Compensation Study for the City of Madison, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Naples, FL; a Classification and Compensation Study for DeSoto County, FL; a Classification and Compensation Study for the City of Brooksville, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Classification and Compensation Study for the City of Moline, IL; a Compensation Study for the City of White House, TN; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of Aransas Pass, TX; a Comprehensive Classification and Compensation Study for the City of Port Arthur, TX; a Classification and Compensation Study for the City of Del Rio, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Total Compensation and Benefits Study for Calaveras County Water District, CA; and a Classification and Compensation Study for the West Basin Municipal Water District, CA.

Ms. Whurr has a Bachelor's of Science in Management Information Systems and possesses a Professional Human Resources certification (PHR) as well as a certification as a professional with SHRM.

**Project Consultant  
Ms. Tara Tabachnik**

Ms. Tara Tabachnik is a Consultant with Evergreen Solutions. She began her career at Evergreen as a Junior Analyst and has since developed exceptional skills and knowledge in Human Resources consulting that she applies in her current role as a Consultant. Since joining Evergreen, she has mastered the art of conducting market surveys and market research and has been a great resource to the project teams. She has taken on a lead role with Evergreen's market survey efforts through the creation of Evergreen's internal data team. She works closely with all project teams by conducting salary surveys, benefits surveys, staffing surveys, analyzing staffing needs; and market research for various types of clients.

A sample of some of the more recent public sector projects that Ms. Tabachnik has been involved with include: a Classification and Compensation Study for the City of Portland, ME; an Employee Compensation Study for Livingston County, NY; a Compensation Consultation Services for Genesee County, NY; a Compensation Study for the City of Seaford, DE; a Classification and Compensation Study for the City of Milford, DE; an Employee Compensation and Classification Study for the City of Takoma Park, MD; a Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for Prince George's County, MD; a



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Classification and Compensation Study for the City of Norfolk, VA; a Classification and Compensation Study for the City of Falls Church, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Market Salary Survey for the City of Rocky Mount, NC; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Classification and Compensation Study for the Broward County Sheriff's Office, FL; a Classification and Compensation Study for DeSoto County, FL; a Compensation Study for the City of Fort Myers, FL; a Classification and Compensation Study for Randall County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Comprehensive Classification and Compensation Study for the City of Odessa, TX; a Classification and Compensation Study for the Town of Prosper, TX; a Compensation and Classification for the City of Denton, TX; a Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; a Review of the Classification and Compensation Study for the City of Rochester, MN; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Compensation Study for the City of Jefferson, MO; a Classification and Compensation Study for Jasper County, MO; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Classification and Compensation Study for the City of Leawood, KS; a Compensation Study for Sedgwick County, KS; a Classification and Benefits Study for the City of St. Peters, MO; a Compensation and Classification Study for Garfield County, CO; a Classification and Compensation Study for the City of Albuquerque, NM; a Classification and Compensation Study/ Gender Pay Equity Analysis for the City of Santa Fe, NM; a Classification and Compensation Study for the Superior Court of California, County of Monterey, CA; a Classification and Compensation Study for the City of Fresno, CA; a Classification and Compensation Study for the City of Thousand Oaks, CA; a Classification and Compensation Study for Inyo County, CA; a Professional Technical and Expert Services for the City of Portland, OR; and a Classification and Compensation Study for the City of Ridgefield, WA; and a Job Classification Market Study for the City of Bellingham, WA.

Ms. Tabachnik has an MBA and a Bachelor's Degree in Finance from Florida State University.



**Note:** A team of experienced analytical and clerical support staff will contribute to this study, as needed.



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*Section 3.0*  
*Approach and Methodology*



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## 3.0 *Approach and Methodology*

In this section, we provide our overall approach and methodology for conducting the Compensation Study for the City of Lakeville; a detailed work plan identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of work of the Request for Quote; our proposed timeline.

### 3.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct the Compensation Study for the City of Lakeville as our team includes recognized experts in local government human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the City’s designated Project Manager, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your need to meet your performance goals while carefully managing the organization’s resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.



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Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

Evergreen realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.

Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.

### **Kick Off Meeting**

Evergreen begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the management structure and approach;
- collecting classification and compensation data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

At this time, we will also request a copy of the employee database that reflects current compensation and classification data.

### **Communication Plan**

Communication is a critical component of any Compensation Study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

### **Developing the Compensation Philosophy**

An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen will meet with the client's leadership team to ascertain the organization's overall business strategy and document the various alternatives that are available to support that strategy. Based on the client's needs, Evergreen will provide the client with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It is imperative for the client to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.



<b>Compensation</b>	Our approach to pay plan analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.
<b>Market Salary Survey</b>	A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen’s consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.
<b>Benchmarks</b>	One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey of salary. We will work with the client to identify the appropriate number of benchmark positions to best suit the client’s needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.
<b>Targets</b>	<p>To conduct an external labor market assessment we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.</p> <p>An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.</p> <p>Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data is</p>



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**Compensation  
Administration  
Guidelines**

received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system. Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as: how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their position; the proper mix of pay; how often to adjust pay scales and survey the market; timing of implementation; and how to keep the system fair and competitive over time.

**System  
Maintenance**

Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

**3.2  
Detailed Work  
Plan**

The detailed work plan that Evergreen proposes to use to conduct a Compensation Study for the City of Lakeville is provided in this section. Evergreen understands that the City has approximately 250 full- and 185 part-time employees in 165 classifications. The study also includes the City's sibling organization – Lakeville Arenas that has 15 position classifications.

Our work plan consists of the following eight work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 4: Conduct Market Salary Survey and Provide External Assessment Summary
- Task 5: Develop Strategic Positioning Recommendations
- Task 6: Conduct Solution Analysis
- Task 7: Develop and Submit Draft and Final Reports
- Task 8: Develop Recommendations for Compensation Administration



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**Task 1.0**  
**Project Initiation**

**TASK GOALS**

- Finalize the project plan with the City.
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final timeline for all project milestones and deliverables.

**TASK ACTIVITIES**

- 1.1 Discuss with the City's Project Manager (CPM), and any other key personnel the following objectives:
- the classification and pay plan study process;
  - understand mission and current compensation philosophy;
  - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
  - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
  - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the City and some of the short- and long-term priorities. This activity serves as the basis for assessing where the City is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials from the City, including:
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
  - organizational charts for the departments and divisions, along with related responsibility descriptions;
  - current position and classification descriptions, salary schedule(s), and classification system; and
  - personnel policies and procedures, including step placement policies.
- 1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.
- 1.5 Provide regular progress reports to the CPM throughout the course of the study.



**Task 2.0  
Evaluate the Current  
System**

**KEY PROJECT MILESTONES**

- Comprehensive project management plan
- Comprehensive database of City staff

**TASK GOAL**

- Conduct a comprehensive preliminary evaluation of the existing compensation plan(s) for the City.

**TASK ACTIVITIES**

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the City's current pay plan(s) and policies. Discuss any pay compression issues that may exist and possible solutions with the CPM.
- 2.3 Work with the CPM to develop or refine a compensation philosophy that reflects the City's recruitment and retention goals.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

**KEY PROJECT MILESTONES**

- Review of existing compensation plan(s)
- Compensation philosophy
- Assessment of current conditions

**Task 3.0  
Identify List of  
Market Survey  
Benchmarks and  
Approved List of  
Targets**

**TASK GOALS**

- Reach an appropriate number and identify the proper benchmark positions for the external labor market salary assessment.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market salary assessment.

**TASK ACTIVITIES**

- 3.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to identify up to 70 City classifications and all 15 of the Lakeville Arenas' classifications to use as benchmarks for the salary survey.



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- 3.2 Finalize the list of positions with the CPM.
  - 3.3 Develop a preliminary list of up to 20 public sector organizations for the external labor market salary survey, placing a comparative emphasis on characteristics such as:
    - size of the organization;
    - geographic proximity to the Lakeville area;
    - economic and budget characteristics; and
    - other demographic data.
  - 3.4 Review and finalize with the CPM peer organizations that should be included in the market salary survey.
  - 3.5 Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
  - 3.6 Review survey methodology with the CPM and refine survey methodology prior to distribution of the survey.
  - 3.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

#### **KEY PROJECT MILESTONES**

- Final list of benchmark positions for the external labor market assessment salary survey
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

#### **Task 4.0 Conduct Market Salary Survey and Provide External Assessment Summary**

#### **TASK GOALS**

- Conduct the external labor market salary survey.
- Provide a summary of the salary survey results to the CPM for review.

#### **TASK ACTIVITIES**

- 4.1 Prepare a customized external labor market salary survey for the CPM approval. Discuss the questions to include in the market salary survey.
- 4.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 4.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.



**Task 5.0  
Develop Strategic  
Positioning  
Recommendations**

- 4.4 Collect and enter survey results into Evergreen’s electronic data analysis tools.
- 4.5 Validate all data submitted.
- 4.6 Develop summary report of external labor market salary survey assessment results.
- 4.7 Submit summary report of external labor market salary survey assessment results to the CPM.

**KEY PROJECT MILESTONES**

- Market salary survey instrument
- Summary report of external labor market salary survey assessment results

**TASK GOALS**

- Determine the City’s compensation philosophy.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

**TASK ACTIVITIES**

- 5.1 Identify the compensation philosophy and accompanying thresholds.
- 5.2 Using the market salary survey data collected in **Tasks 4.0**, and the compensation data reviewed in **Task 2.0**, determine the proper pay structure and ranges for the City’s positions.
- 5.3 Recommend to the CPM how often compensation studies should be conducted to maintain market alignment.
- 5.4 Suggest policies or frameworks for reviewing individual employee salaries outside the normal study cycle (e.g., mid-year review requests).
- 5.5 Provide guidance on communication strategies for pay adjustments and maintaining transparency with employees.
- 5.6 Assist the City with integrating recommendations into the City’s pay plan and HR policies
- 5.7 Produce a pay plan(s) for the City for staff that best meets its needs from an external equity standpoint.



**Task 6.0  
Conduct Solution  
Analysis**

**KEY PROJECT MILESTONES**

- Proposed compensation strategic direction, taking into account external equity
- Revised pay plan/structure

**TASK GOALS**

- Slot classifications into the revised or new pay structure based on survey results.
- Propose several possible options for implementation.

**TASK ACTIVITIES**

- 6.1 Use a market-based approach, or other appropriate techniques, to properly slot each classification into the proposed pay structure.
- 6.2 Place all classifications into pay grades based on **Task Activity 6.1**. Sort alphabetically by job class title, in descending order by structure and/or range, and by old class title and new class specifications.
- 6.3 Create implementation solutions for consideration that take into account the current compensation philosophy and financial impact, as well as the findings from the compensation analysis. Recommend alternative compensation policy changes.
- 6.4 Determine the best solution to meet the needs of the City in the short and long-term.
- 6.5 Document the accepted solution.

**KEY PROJECT MILESTONES**

- Revised or new pay scale(s)
- Classification assignments by pay grade
- Implementation plan(s)
- Documented final solution

**Task 7.0  
Develop and Submit  
Draft and Final  
Reports**

**TASK GOALS**

- Develop and submit a draft and Final Report of the Compensation Study to the City of Lakeville.
- Present the Final Report.



**Task 8.0  
Develop  
Recommendations  
for Compensation  
Administration**

**TASK ACTIVITIES**

- 7.1 Produce a comprehensive draft report from all previous steps and provide to the CPM and any other key personnel. The draft report will include all cost associated with recommendations as well as implementation strategies.
- 7.2 Make edits and submit necessary copies of the Final Report to the CPM.
- 7.3 Present the Final Report.
- 7.4 Develop a communication plan to inform staff of the study results.
- 7.5 Develop a plan for maintaining recommendations over time.

**KEY PROJECT MILESTONES**

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

**TASK GOAL**

- Develop recommendations for continued administration by City staff to sustain the recommended compensation system/structure.

**TASK ACTIVITIES**

- 8.1 Develop recommendations and guidelines for continued administration and maintenance of the compensation system, including recommendations and guidelines related to:
  - how employees will move through the pay structure/ system as a result of transfers, promotions, or demotions;
  - how to pay employees whose base pay has reached the maximum of their pay structure and/or range or value of their position;
  - the proper mix of pay;
  - how often to adjust pay scales and survey the market;
  - the timing of implementation; and
  - how to keep the system fair and competitive over time.



8.2 Finalize and present recommendations to the CPM.

**KEY PROJECT MILESTONE**

- Recommendations for compensation administration

**3.3  
Proposed  
Timeline**

Evergreen possesses the ability, staff, skills, and tools to conduct the Compensation Study for the City of Lakeville in approximately 90 days of the project start date and execution of a contract. Our proposed timeline is based on a tentative start date of January 1, 2026, and a completion date of March 30, 2026.

Our proposed timeline, as identified in **Exhibit 3-1**, can be modified in any way to best meet the needs of the City of Lakeville.

**Exhibit 3-1  
Proposed Timeline**

PROJECT TASKS	2026		
	JAN	FEB	MAR
1.0 - Project Initiation	█		
2.0 - Evaluate the Current System	█		
3.0 - Identify List of Market Survey Benchmarks and Approved List of Targets	█		
4.0 - Conduct a Market Salary Survey and Provide External Assessment Summary	█	█	
5.0 - Develop Strategic Positioning Recommendations			█
6.0 - Conduct Solution Analysis			█
7.0 - Develop and Submit Draft and Final Reports			█
8.0 - Develop Recommendations for Compensation Administration			█



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*Section 4.0*  
*References*



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## 4.0 References

In this section, we have provided you with the following three references that we feel demonstrate the breadth and quality of the work our team has performed as it relates to the services being requested by the City of Lakeville. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

### **Compensation and Classification Study**

**City of Minneapolis – Public Works Department, Minnesota**

**Contact Information:** Bryan Seboe, Manager – Administration and Personnel at City of Minneapolis Public Works, (612) 673-3000, [Bryan.Seboe@minneapolismn.gov](mailto:Bryan.Seboe@minneapolismn.gov)



### **Classification and Compensation Study**

**City of Moline, Illinois**

**Contact Information:** Leah Miller, Human Resources Director, (309) 524-2069, [lmiller@moline.il.us](mailto:lmiller@moline.il.us)



### **Compensation Study**

**City of Portsmouth, New Hampshire**

**Contact Information:** Kelly Harper, Human Resources Director, (603) 610-4478, [kaharper@cityofportsmouth.com](mailto:kaharper@cityofportsmouth.com)



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*Section 5.0*  
*Cost Estimate*



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## 5.0 *Cost Estimate*

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Compensation Study for the City of Lakeville. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our prices are reasonable so we can pass that price savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks in our detailed work plan in **Section 3** of our proposal is **\$32,500**. Our cost is all inclusive, and includes travel cost (meals and lodging), transportation, fringe benefits, indirect cost (overhead), clerical support, and all other out-of-pocket fees. Our cost includes one onsite visit to the City to perform the requested work as most of the work can be conducted virtually.

**Note:** Any work outside of the scope of work would be billed at \$150 per hour or would be negotiated depending on the type of work being requested.

Our preferred payment schedule for all tasks in our work plan is as follows:

- 33% - upon completion of Tasks 1 – 2
- 33% - upon completion of Tasks 3 – 4
- 34% - upon completion of Tasks 5 – 8

**Note:** All invoices are due within 30 days of receipt or the project may be delayed in moving to the next deliverable identified in the detailed work plan for the project.

**We are willing to negotiate the time, scope, and price of the basic tasks, or any other options that the City of Lakeville wishes to identify.**





**Date:** 1/20/2026

## **Professional Services Agreement for Kenrick Aveune Wall Repairs and Area Drainage Improvements**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve a professional services agreement with WSB for design of the Kenrick Ave retaining wall repairs and drainage improvements, City Project P-21.

### **Overview**

This project includes repairing and/or replacing portions of the existing retaining wall along Kenrick Avenue that provides access to the fishing pier on Lake Marion. As part of this effort, staff and WSB will also evaluate drainage conditions in the area to determine whether updates or stormwater treatment improvements are needed. If warranted, this work will be incorporated into the project to ensure continued safe and ADA-compliant access along the trail and down to the fishing pier.

Staff has reviewed the proposal, finds it acceptable, and recommends approval.

### **Supporting Information**

1. WSB Supplemental Agreement Kenrick Wall, Trail and Drainage

<p><b>Financial Impact:</b> \$61,152    <b>Budgeted:</b> Yes    <b>Source:</b> Park and Trail Improvement Fund <b>Envision Lakeville Community Values:</b> Safety Throughout the Community <b>Report Completed by:</b> Steve Ferraro, Public Works Coordinator</p>
--



January 9, 2025

Mr. Steve Ferraro  
Public Works Coordinator  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville, MN 55044

**RE:** Supplemental Agreement to Provide Professional Engineering Services including Final Design and Bidding Assistance, Construction Administration and Construction Staking  
2026 Kenrick Avenue Trail, Drainage and Wall Improvements

Dear Mr. Ferraro:

On behalf of WSB we are pleased to submit this Supplemental Agreement to our Professional Services Agreement, dated September 20, 2021, to provide engineering services to the City. Specifically, our services will include final design and bidding support, construction administration support and construction staking for the 2026 Kenrick Avenue Trail, Drainage and Wall Improvements.

### **PROJECT UNDERSTANDING**

The scope of the 2026 Kenrick Avenue Trail, Drainage and Wall Improvements includes drainage modifications along Kenrick Avenue, trail replacement with dowels, the addition of weep holes to Wall No. 3, placement of rip rap along the lake line adjacent to Wall No. 3 and placement of structural reinforced backfill under the new structural trail slab to improve stability in past washout areas.

### **PROJECT APPROACH/SCOPE OF SERVICES**

WSB's project scope and proposed tasks are based on our understanding of the project, and we propose the following scope of services:

#### **Task 1 – Final Design**

##### **Project Management**

Project management includes the development of the project plan through bidding. This task includes the appropriation of necessary staff and resources at all stages of the final design process to achieve project milestones and completion. This includes frequent communication and coordination with City staff and its agents governing all aspects of the project. Proper completion of this task will allow for open lines of communication and routine updates on project issues, as well as keeping the project on schedule and within budget.

##### **Supplemental Topographic Survey**

Additional topographic survey information will be collected for design associated with the drainage improvements.

### Design, Specifications, and Plan Preparation

WSB will:

- Complete the design and prepare the project plans consistent with City, ADA, and local regulatory standards.
- Design of a reinforced concrete slab along Wall No. 3 to be doweled to Wall No. 3.
- Details for weep hole additions to Wall No. 3
- Details for rip rap installation along Wall No. 3 at the lake level
- Drainage design, including the addition of additional concrete curb and gutter along the east side of Kenrick Avenue
- Develop a traffic control plan for the installation of new concrete curb and gutter
- Facilitate a Utility Coordination Meeting for the project.
- Prepare the specifications consistent with City, ADA, and local regulatory standards.
- Calculate project quantities and prepare the project Bid Form.
- Prepare an Engineer's Opinion of Probable Cost on the final design.
- Perform quality control reviews regularly throughout the duration of the design.

The project plans will be generally organized as follows:

- Title sheet
- SEQ and Tabulations
- Standard details
- Removals and proposed improvements
- Erosion control

Deliverables:

- 90% Plan and Specification Submittal: Draft plan set and specifications for City review and comment (electronic)
- 100% Plan and Specification Submittal (electronic)

### Permits

Prepare the following permits:

- Minnesota Pollution Control Agency – NPDES permit
- Minnesota Department of Natural Resources (DNR) – Work in Public Waters Permit
- *Note: Our proposal assumes no wetland delineation will be required for the outfall into Lake Marion as an OHW has been established by the DNR and the lake edge is well established. Should the DNR require a delineation, WSB will provide a separate scope and proposal for that work.*

### Bidding Assistance

Assist the City in soliciting bids for the work in compliance with the City's practices; facilitate project bidding by answering contractor questions and prepare the Addenda if necessary.

### As-builts

WSB will prepare as-builts consistent with the City of Lakeville standards for utility work associated within each individual area. Deliverables will include a .pdf version of the as-builts.

Once the project is complete, WSB will survey the top and bottom of Wall #3 and #1, to develop a new baseline condition. This will be included in the project files.

Using as-builts and AutoCAD drawing files, WSB will update the City's GIS utility data and other GIS datasets for the 2026 Kenrick Avenue Trail, Drainage and Wall Improvements. WSB will take as-built plan sets and AutoCAD files created during the project and update the City's GIS data based on information present in the plan set. This information can include features related to sanitary sewer, storm sewer, water distribution, and streets. The as-built plan set will be linked to the appropriate pipe linework within GIS. All attribute data currently tracked will also be updated for the newly added features. WSB will update existing feature classes hosted as Feature Layers through the City's ArcGIS Online site. These updates will be completed by editing the hosted Feature Layers directly in ArcGIS Pro.

#### **Task 4 – Assisting the City with Construction Management**

##### Construction Staking

WSB will provide construction staking and survey for construction of the project. WSB assumes one-time staking for all required staking needs. Any re-staking will be billed at a time and materials hourly rate.

##### Construction Contract Administration

WSB will provide Contract Administration services through construction of the project and final project closeout. This will include:

- Preparation of materials for and attendance at the preconstruction meeting for the project.
- Responding to all contractor requests for information (RFI).
- Responding to all City requests for information/clarification during construction.

We understand that the City does not anticipate needing construction observation support for the project. Should the City's needs change, WSB can provide a separate proposal to provide construction observation services for the 2026 construction season.

##### **Work Performed by the City of Lakeville**

It is our understanding that the City of Lakeville will coordinate all proposals and deliverables for construction materials testing work with Braun Intertec.

The City will bid the project using their bidding software. WSB will provide the City with a list of all bid items and quantities for import into the City's bidding system. The City will also perform the following Construction Administration tasks associated with the project:

- Preparation of all pay vouchers.
- Prepare contract modifications including Work Orders, Change Orders, and Supplemental Agreements.

##### **Schedule**

Based on our discussions with City Staff, we are proposing the following schedule for the 2026 Kenrick Avenue Trail, Drainage and Wall Improvement Project:

- 90% plans and spec delivered to the City for review February 27, 2026
- City returns 90% plan comments to WSB March 6, 2026
- Advertise Ads for Bid March 27, 2026.
- Award Contract May 4, 2026

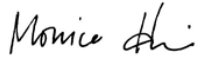
**PROPOSED FEE**

WSB will provide the services as outlined in Project Approach/Scope of Services. Our budget was developed based on our understanding of the scope and experience with past reconstruction projects in the area. We estimate an hourly not to exceed fee of **\$61,152.00**

The proposed scope and fee presented herein represents our complete understanding of the project based on site visits and discussions with City staff. If you have any questions or concerns, please feel free to contact me at (952) 843-8323. Once again, we appreciate the opportunity to submit this proposal and look forward to working with you and your staff.

Sincerely,

WSB



Monica Heil, PE  
Senior Vice President, Municipal

**Attachments**

Cc: Carl Osberg, WSB  
Jake Newhall, WSB

**ACCEPTED BY:**

City of Lakeville

By: \_\_\_\_\_  
Luke Hellier, Mayor

Date: \_\_\_\_\_

Attest: \_\_\_\_\_  
Ann Orlofsky, City Clerk



**Estimate of Fee**  
**City of Lakeville**  
**Professional Engineering Services**  
**2026 Kenrick Avenue Trail, Drainage and Wall Improvements**



Task Description	Estimated Hours												Total Hours	Fee
	Principal	Structural Engineer	Structural Technician	Water Res. Project Manager	Water Res. Graduate Engineer	Graduate Engineer	GIS Technician	Engineering Technician	Administrative Assistant	Construction Specialist	Survey Coordinator	One-Person Survey Crew		
	<i>Monica Heil</i>	<i>Carl Osberg</i>	<i>Brad Robinson</i>	<i>Jake Newhall</i>	<i>Sarah Risius</i>	<i>Erik Moberg</i>	<i>Jane Isaacs</i>	<i>Alex Heggen</i>	<i>Jen Croft</i>	<i>John Koch</i>	<i>Jim Barich</i>	<i>N/A</i>		
<b>1 Final Design</b>														
1.1 Project Management	2	2		4									8	\$2,268.00
1.2 Supplemental Topographic Survey for Drainage Improvements										2	8		10	\$2,050.00
1.3 Design	2	10	2										14	\$3,820.00
1.4 Storm Sewer Design				12	40								52	\$9,828.00
1.5 Specifications	2	2		4	8	8							24	\$4,788.00
1.6 Assist City with Bidding	2	2		2	2				4				12	\$2,534.00
1.7 Drawings/Layouts		6	26			3		32					67	\$11,641.00
1.8 Quantity Estimates		2	4	2	4	4							16	\$3,248.00
1.9 Meetings	1	1		1	1								4	\$1,017.00
1.10 Permit Application				2	10								12	\$2,178.00
1.11 QA / QC	2	2		2									6	\$1,710.00
1.12 Utility Coordination	2					4							6	\$1,206.00
1.30 As-Builts	2	1	1				4	4			2	4	18	\$3,417.00
<b>Task 1 Total Estimated Hours and Fee</b>	<b>15</b>	<b>28</b>	<b>33</b>	<b>29</b>	<b>65</b>	<b>19</b>	<b>4</b>	<b>36</b>	<b>4</b>		<b>4</b>	<b>12</b>	<b>249</b>	<b>\$49,705.00</b>
<b>2 Assisting the City with Construction Mgmt.</b>														
2.1 Preconstruction Meeting Attendance	2	2		2									6	\$1,710.00
2.2 Review of Contractor Submittals		2			2	2							6	\$1,188.00
2.3 Construction Administration										8			8	\$1,088.00
2.4 Construction Staking											4	12	16	\$3,284.00
2.5 Wall Slab Survey			2								1	8	11	\$2,277.00
2.6 Project Closeout	2					2							4	\$900.00
<b>Task 2 Total Estimated Hours and Fee</b>	<b>4</b>	<b>4</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>4</b>				<b>8</b>	<b>5</b>	<b>20</b>	<b>51</b>	<b>\$10,447.00</b>
<b>Total Estimated Hours</b>	<b>19</b>	<b>32</b>	<b>35</b>	<b>31</b>	<b>67</b>	<b>23</b>	<b>4</b>	<b>36</b>	<b>4</b>	<b>8</b>	<b>9</b>	<b>32</b>	<b>300</b>	
<b>Average Hourly Billing Rate</b>	297.00	279.00	218.00	279.00	162.00	153.00	153.00	120.00	125.00	136.00	209.00	204.00		
<b>Total Fee by Labor Classification</b>	<b>\$5,643.00</b>	<b>\$8,928.00</b>	<b>\$7,630.00</b>	<b>\$8,649.00</b>	<b>\$10,854.00</b>	<b>\$3,519.00</b>	<b>\$612.00</b>	<b>\$4,320.00</b>	<b>\$500.00</b>	<b>\$1,088.00</b>	<b>\$1,881.00</b>	<b>\$6,528.00</b>		<b>\$60,152.00</b>
<b>TOTAL PROJECT FEE</b>														<b>\$60,152.00</b>



**Date:** 1/20/2026

## **Agreements with Xcel Energy for Streetlight Replacement**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve agreements with Xcel Energy for replacement of streetlights on Kensington Boulevard and 210th Street.

### **Overview**

Staff is requesting City Council approval of two agreements with Xcel Energy to replace seven streetlights located on 210th Street and Kensington Boulevard. These streetlights are more than 25 years old and have exceeded the 25-year maintenance term under the City's existing agreement with Xcel Energy.

The City contracts with both Dakota Electric Association and Xcel Energy for the maintenance and operation of all streetlights within the public right-of-way. The streetlights proposed for replacement are located within Xcel Energy's service territory.

Under the proposed agreements, the City would continue to pay the monthly electricity and maintenance fees, and Xcel Energy would maintain the new streetlights for a period of 25 years.

### **Supporting Information**

1. Kensington Ave Streetlight Replacement Agreement
2. 210th Street Streetlight Replacement Agreement

<p><b>Financial Impact:</b> \$76,110.65    <b>Budgeted:</b> Yes    <b>Source:</b> Streetlight Fund <b>Envision Lakeville Community Values:</b> Good Value for Public Services <b>Report Completed by:</b> Paul Oehme, Public Works Director</p>
---

Account No. \_\_\_\_\_  
Job No. \_\_\_\_\_  
Job Address \_\_\_\_\_  
\_\_\_\_\_



Northern States Power Company - Minnesota

Dear

Thank you for choosing Xcel Energy to be your energy provider. We appreciate your business, and our goal is to deliver you reliable service at an affordable price.

**This letter contains important information about your requested service. Please read all details below as well as any accompanying information and respond accordingly to ensure your project is completed accurately and timely.**

This letter relates to your request for:

Your portion of the cost of this project is \_\_\_\_\_. A hard copy invoice will be sent to you via U.S. Mail Postal Service in the coming days. Please see the attached payment options document for more instructions. Upon receipt of payment and other required documentation as noted below, your project will be scheduled and you will be notified of the scheduled date. If paying by check, please note the account number identified at the top of this letter on your check to ensure accurate and timely payment processing.

Below is a list of additional documentation that you will need to review, sign, and return to the Xcel Energy Design Operations Specialist by email at [NSPMDesignCIAC@xcelenergy.com](mailto:NSPMDesignCIAC@xcelenergy.com) or U.S. Postal Service to their address listed at the bottom of the letter. Please retain a copy of all documentation for your records.

➤ **Documents to be returned to Xcel Energy:**

➤ **Additional enclosures:**

If you have any questions about the enclosures or about your specific job, please contact the design representative below and reference your account number and/or job number above.

We look forward to being your energy provider.

Sincerely,

Xcel Energy



## Customer Payment Options

Xcel Energy offers seven payment options to pay for your construction project. Please select the payment options that work best for you.

### Payment options listed in order of quickest processing

#### **MyAccount/eBill™**

Register at [xcelenergy.com](http://xcelenergy.com) to make a payment from your checking account. You can also enroll in eBill and an email will let you know your bill is ready to view at the MyAccount site in place of receiving a mailed paper bill statement. MyAccount also provides a convenient list of your bill statement and payment history and retains your banking information for future use. Each additional account number will have to be added to your list of managed accounts within MyAccount.

#### **Pay by Phone**

Make payment from your checking or savings account at no charge by using our automated phone system. Please call us at 800.895.4999.

#### **Credit/Debit Card Payment**

All Xcel Energy residential and business customers are now eligible for payment via credit or debit card. Most major credit and debit cards accepted. Apple Pay or Google Pay is available to customers with a mobile device.

To pay by phone, call our payment processing partner, Kubra EZ Pay, at **833.660.1365**

To pay online, visit [www.xcelenergy.com/billing\\_and\\_payment](http://www.xcelenergy.com/billing_and_payment) and click on the **Pay with credit/debit card** link to make an online credit/debit card payment through Kubra EZ Pay.

*Please note the current fees along with payment information:*

- *Residential Customer Accounts*
  - *Payments accepted for up to \$1,000 in a single transaction*
    - *There is a \$1.80 fee per transaction*
    - *No fee for Wisconsin and Michigan residential customer accounts*
- *Non-Residential Customer Accounts*
  - *Payments accepted for up to \$100,000 in a single transaction*
    - *There is a 2.2% fee per transaction.*

*All credit/debit card types allow a maximum 25 credit/debit card payments in a 28-rolling-day period, per Xcel Energy account, per credit/debit card.*

\*If you receive this message: "The information provided does not match our records please try again," while trying to make a payment, please try again the following day after 8am CST.

### **Overnight Payment Delivery Options**

Send your payment and remittance stub including **account number (written on the memo line of your check)** via FedEx, UPS or USPS overnight delivery to:

Xcel Energy  
C/O Deluxe - Lockbox # 4176  
5450 N Cumberland Ave  
Chicago, IL 60656

Contact Phone (needed for the form): 800.895.4999

### **In-Person Pay Stations**

Pay in-person at a location near you by visiting [xcelenergy.com](http://xcelenergy.com) for pay station locations. **Please include the account number on the memo line of your check.**

*Please note:* A \$1.50 transaction fee applies. (\$1.45 for Western Union only in Colorado)

### **Pay by U.S Postal Service**

When sending payment by U.S. mail, **please include the account number on the memo line of your check.** Do not combine this payment with any other Xcel Energy bill payments. Mail check payments to:

Xcel Energy  
P.O. Box 4176  
Carol Stream, IL 60197-4176

### **Electronic Funds Transfer (EFT) (Only available to business)**

The Electronic Funds Transfer (EFT) payment process allows business customers to pay via Corporate Trade Exchange (CTX) formatted Automated Clearing House (ACH) (also referred to as EDI-820), the ability to electronically remit payment. The payments to Xcel Energy's bank accounts are initiated by the customer through a series of steps linked to the billing system. The CTX addenda records included with the funds transfer allow the posting of the payments to occur electronically to the account numbers provided by the customer. To obtain Xcel Energy's EFT bank account numbers and to provide transfer confirmation, please email [CustReceive@xcelenergy.com](mailto:CustReceive@xcelenergy.com).

### **Helpful hints to ensure accurate and timely processing of your payment:**

- For all payment options, please have your account number available and note on any payment documentation.
- The hard copy invoice will be sent to you via U.S mail in the coming days. If you would like an electronic copy of our invoice prior to receiving the hard copy, please contact your Designer who is identified in the attached letter.
- In order to apply payment to the correct account and avoid unnecessary delays, please make separate payments for each individual project or invoice.
- Please note that depending on payment selection, it may take up to a few days to process your payment.



**STATEMENT OF WORK REQUESTED**

DATE: \_\_\_\_\_, 20\_\_\_\_\_

WORK REQUESTED BY: \_\_\_\_\_

WORK LOCATION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

CONSISTING OF:

The facilities installed or removed by Northern States Power Company, a Minnesota corporation ("Xcel Energy" or the "Company") shall be the property of the Company and any payment by customer shall not entitle customer to any ownership interest or right therein. Customer's and Company's rights and obligations with respect to the facilities and services provided through the facilities are subject to additional terms and conditions as provided in the General Rules and Regulations and/or in the Rate Schedules of Xcel Energy's Electric Rate Book for Customer's specific service, as they now exist or may hereafter be changed, on file with the state regulatory commission in the state where service is provided.

The undersigned hereby requests and authorizes Northern States Power Company, a Minnesota corporation ("Xcel Energy") to do the work described above, and in consideration thereof, agrees to pay

(\$ \_\_\_\_\_)

in accordance with the following terms:

\_\_\_\_\_

Receipt of the above amount hereby acknowledged on behalf of the Company by \_\_\_\_\_



XCEL ENERGY SIGNATURE	CUSTOMER SIGNATURE
Northern States Power Company	Legal Entity Name (if applicable):
By:	Authorized Signer (see signing options below*): <i>Signing Option 1</i> <input type="checkbox"/> AGREE <i>Signing Option 2</i> (Signature below)  By:
Printed Name:	Printed Name:
Title:	Title (if applicable):
Date:	Date:

\* **Signing Option 1 (just click to agree):** By clicking the AGREE checkbox above, you acknowledge that you are the customer or an authorized signer for the customer and have read, understand, and agree to the above-stated terms.  
**Signing Option 2:** Add Electronic Signature and return by e-mail **OR** print, sign, scan and return by e-mail **OR** print and sign and return by mail.

**FOR XCEL ENERGY USE**

Xcel Energy Representative \_\_\_\_\_ Xcel Energy Work Order # \_\_\_\_\_

Construction \$	Removal \$	Total \$
_____	_____	_____

Form 17-7012

ADDITIONAL DETAILS:

Account No. \_\_\_\_\_  
Job No. \_\_\_\_\_  
Job Address \_\_\_\_\_  
\_\_\_\_\_



Northern States Power Company - Minnesota

Dear

Thank you for choosing Xcel Energy to be your energy provider. We appreciate your business, and our goal is to deliver you reliable service at an affordable price.

**This letter contains important information about your requested service. Please read all details below as well as any accompanying information and respond accordingly to ensure your project is completed accurately and timely.**

This letter relates to your request for:

Your portion of the cost of this project is \_\_\_\_\_. A hard copy invoice will be sent to you via U.S. Mail Postal Service in the coming days. Please see the attached payment options document for more instructions. Upon receipt of payment and other required documentation as noted below, your project will be scheduled and you will be notified of the scheduled date. If paying by check, please note the account number identified at the top of this letter on your check to ensure accurate and timely payment processing.

Below is a list of additional documentation that you will need to review, sign, and return to the Xcel Energy Design Operations Specialist by email at [NSPMDesignCIAC@xcelenergy.com](mailto:NSPMDesignCIAC@xcelenergy.com) or U.S. Postal Service to their address listed at the bottom of the letter. Please retain a copy of all documentation for your records.

➤ **Documents to be returned to Xcel Energy:**

➤ **Additional enclosures:**

If you have any questions about the enclosures or about your specific job, please contact the design representative below and reference your account number and/or job number above.

We look forward to being your energy provider.

Sincerely,

Xcel Energy



## Customer Payment Options

Xcel Energy offers seven payment options to pay for your construction project. Please select the payment options that work best for you.

### Payment options listed in order of quickest processing

#### **MyAccount/eBill™**

Register at [xcelenergy.com](http://xcelenergy.com) to make a payment from your checking account. You can also enroll in eBill and an email will let you know your bill is ready to view at the MyAccount site in place of receiving a mailed paper bill statement. MyAccount also provides a convenient list of your bill statement and payment history and retains your banking information for future use. Each additional account number will have to be added to your list of managed accounts within MyAccount.

#### **Pay by Phone**

Make payment from your checking or savings account at no charge by using our automated phone system. Please call us at 800.895.4999.

#### **Credit/Debit Card Payment**

All Xcel Energy residential and business customers are now eligible for payment via credit or debit card. Most major credit and debit cards accepted. Apple Pay or Google Pay is available to customers with a mobile device.

To pay by phone, call our payment processing partner, Kubra EZ Pay, at **833.660.1365**

To pay online, visit [www.xcelenergy.com/billing\\_and\\_payment](http://www.xcelenergy.com/billing_and_payment) and click on the **Pay with credit/debit card** link to make an online credit/debit card payment through Kubra EZ Pay.

*Please note the current fees along with payment information:*

- *Residential Customer Accounts*
  - *Payments accepted for up to \$1,000 in a single transaction*
    - *There is a \$1.80 fee per transaction*
    - *No fee for Wisconsin and Michigan residential customer accounts*
- *Non-Residential Customer Accounts*
  - *Payments accepted for up to \$100,000 in a single transaction*
    - *There is a 2.2% fee per transaction.*

*All credit/debit card types allow a maximum 25 credit/debit card payments in a 28-rolling-day period, per Xcel Energy account, per credit/debit card.*

\*If you receive this message: "The information provided does not match our records please try again," while trying to make a payment, please try again the following day after 8am CST.

### **Overnight Payment Delivery Options**

Send your payment and remittance stub including **account number (written on the memo line of your check)** via FedEx, UPS or USPS overnight delivery to:

Xcel Energy  
C/O Deluxe - Lockbox # 4176  
5450 N Cumberland Ave  
Chicago, IL 60656

Contact Phone (needed for the form): 800.895.4999

### **In-Person Pay Stations**

Pay in-person at a location near you by visiting [xcelenergy.com](http://xcelenergy.com) for pay station locations. **Please include the account number on the memo line of your check.**

*Please note:* A \$1.50 transaction fee applies. (\$1.45 for Western Union only in Colorado)

### **Pay by U.S Postal Service**

When sending payment by U.S. mail, **please include the account number on the memo line of your check.** Do not combine this payment with any other Xcel Energy bill payments. Mail check payments to:

Xcel Energy  
P.O. Box 4176  
Carol Stream, IL 60197-4176

### **Electronic Funds Transfer (EFT) (Only available to business)**

The Electronic Funds Transfer (EFT) payment process allows business customers to pay via Corporate Trade Exchange (CTX) formatted Automated Clearing House (ACH) (also referred to as EDI-820), the ability to electronically remit payment. The payments to Xcel Energy's bank accounts are initiated by the customer through a series of steps linked to the billing system. The CTX addenda records included with the funds transfer allow the posting of the payments to occur electronically to the account numbers provided by the customer. To obtain Xcel Energy's EFT bank account numbers and to provide transfer confirmation, please email [CustReceive@xcelenergy.com](mailto:CustReceive@xcelenergy.com).

### **Helpful hints to ensure accurate and timely processing of your payment:**

- For all payment options, please have your account number available and note on any payment documentation.
- The hard copy invoice will be sent to you via U.S mail in the coming days. If you would like an electronic copy of our invoice prior to receiving the hard copy, please contact your Designer who is identified in the attached letter.
- In order to apply payment to the correct account and avoid unnecessary delays, please make separate payments for each individual project or invoice.
- Please note that depending on payment selection, it may take up to a few days to process your payment.



**STATEMENT OF WORK REQUESTED**

DATE: \_\_\_\_\_, 20\_\_\_\_\_

WORK REQUESTED BY: \_\_\_\_\_

WORK LOCATION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

CONSISTING OF:

The facilities installed or removed by Northern States Power Company, a Minnesota corporation ("Xcel Energy" or the "Company") shall be the property of the Company and any payment by customer shall not entitle customer to any ownership interest or right therein. Customer's and Company's rights and obligations with respect to the facilities and services provided through the facilities are subject to additional terms and conditions as provided in the General Rules and Regulations and/or in the Rate Schedules of Xcel Energy's Electric Rate Book for Customer's specific service, as they now exist or may hereafter be changed, on file with the state regulatory commission in the state where service is provided.

The undersigned hereby requests and authorizes Northern States Power Company, a Minnesota corporation ("Xcel Energy") to do the work described above, and in consideration thereof, agrees to pay

(\$ \_\_\_\_\_)

in accordance with the following terms:

\_\_\_\_\_

Receipt of the above amount hereby acknowledged on behalf of the Company by \_\_\_\_\_



XCEL ENERGY SIGNATURE	CUSTOMER SIGNATURE
Northern States Power Company	Legal Entity Name (if applicable):
By:	Authorized Signer (see signing options below*): <i>Signing Option 1</i> <input type="checkbox"/> AGREE <i>Signing Option 2</i> (Signature below)  By:
Printed Name:	Printed Name:
Title:	Title (if applicable):
Date:	Date:

\* **Signing Option 1 (just click to agree):** By clicking the AGREE checkbox above, you acknowledge that you are the customer or an authorized signer for the customer and have read, understand, and agree to the above-stated terms.  
**Signing Option 2:** Add Electronic Signature and return by e-mail **OR** print, sign, scan and return by e-mail **OR** print and sign and return by mail.

**FOR XCEL ENERGY USE**

Xcel Energy Representative \_\_\_\_\_ Xcel Energy Work Order # \_\_\_\_\_

Construction \$	Removal \$	Total \$
_____	_____	_____

Form 17-7012

ADDITIONAL DETAILS:



**Date:** 1/20/2026

## **North Ryan Second Addition**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve a resolution approving the plat of North Ryan Second Addition.

### **Overview**

Dakota County has submitted an application and plans for the final plat of North Ryan Second Addition and the development of a recycling facility. The property is located south of 215th Street (CSAH 70), north of 217th Street and west of Jacquard Avenue and totals 11.97 acres. The property is platted as Outlot B, North Ryan Addition and is zoned OP, Office Park District. A conditional use permit was required and approved with the preliminary plat to allow a government building warehouse facility in the OP, Office Park District.

The final plat is consistent with the preliminary plat and complies with the Subdivision Ordinance requirements. Final plat approval is subject to the execution of the Development Contract for the parcel. The Developer and property owner are working with City staff on the details of the agreement. Once finalized, it will be brought forward to City Council for review and approval.

### **Supporting Information**

1. Final Plat Resolution
2. Exhibits
3. Staff Reports

<p><b>Financial Impact:</b> NA    <b>Budgeted:</b> No    <b>Source:</b> <b>Envision Lakeville Community Values:</b> Diversified Economic Development <b>Report Completed by:</b> Heather Botten, Senior Planner</p>
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*(Reserved for Dakota County Recording Information)*

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**CITY OF LAKEVILLE  
DAKOTA COUNTY, MINNESOTA**

**RESOLUTION NO. 26-\_\_\_\_\_**

**RESOLUTION APPROVING THE FINAL PLAT OF  
NORTH RYAN SECOND ADDITION**

**WHEREAS**, the owner of the plat described as North Ryan Second Addition has requested final plat approval; and

**WHEREAS**, the preliminary plat was reviewed by the Planning Commission and recommended for approval on January 4, 2024; and

**WHEREAS**, the final plat is consistent with the preliminary plat approved by the City Council; and

**WHEREAS**, the final plat meets Subdivision Ordinance requirements; and

**WHEREAS**, the final plat is acceptable to the City.

**NOW, THEREFORE, BE IT RESOLVED** by the Lakeville City Council:

1. The North Ryan Second Addition final plat is hereby approved subject to Developer executing a Development Contract for the plat and any other agreements related thereto and recording the Development Contract simultaneously with the plat.

2. The Mayor and City Clerk are hereby authorized to sign the final plat mylars, subject to the terms provided under Paragraph 1 of this Resolution.
3. The City Clerk is directed to file a certified copy of this resolution with the Dakota County Recorder.

**ADOPTED by the Lakeville City Council this 20<sup>th</sup> day of January 2026.**

CITY OF LAKEVILLE

BY: \_\_\_\_\_  
Luke M. Hellier, Mayor

ATTEST:

\_\_\_\_\_  
Ann Orlofsky, City Clerk

STATE OF MINNESOTA )  
  (  
CITY OF LAKEVILLE    )

I hereby certify that the foregoing Resolution No. 26-\_\_\_\_ is a true and correct copy of the resolution presented to and adopted by the City Council of the City of Lakeville at a duly authorized meeting thereof held on the 20<sup>th</sup> day of January 2026 as shown by the minutes of said meeting in my possession.

\_\_\_\_\_  
Ann Orlofsky, City Clerk

(SEAL)

# NORTH RYAN SECOND ADDITION

KNOW ALL PERSONS BY THESE PRESENTS: That Dakota County, a Minnesota political subdivision, owner of the following described property:

*Outlot B, NORTH RYAN ADDITION, according to the recorded plat thereof, Dakota County, Minnesota.*

Has caused the same to be surveyed and platted as NORTH RYAN SECOND ADDITION and does hereby dedicate to the public for public use the drainage and utility easements as created by this plat.

In witness whereof said Dakota County, a Minnesota political subdivision, pursuant to a resolution from its Board of Commissioners, has caused these presents to signed by the Chair of the Board of Commissioners and by its Clerk to the Board this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

By: \_\_\_\_\_ Chair – County Board of Commissioners By: \_\_\_\_\_ Clerk to the Board

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

This instrument was acknowledged before me on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by \_\_\_\_\_ Chair – County Board of Commissioners, and by \_\_\_\_\_ Clerk to the Board of Dakota County, a Minnesota political subdivision, on behalf of the political subdivision and pursuant to authority from the Board of Commissioners.

\_\_\_\_\_  
(Signature) (Name Printed)

Notary Public, \_\_\_\_\_ County, \_\_\_\_\_

My Commission Expires \_\_\_\_\_

### SURVEYORS CERTIFICATE

I Kyle A. Domek do hereby certify that this plat was prepared by me or under my direct supervision; that I am a duly Licensed Land Surveyor in the State of Minnesota; that this plat is a correct representation of the boundary survey; that all mathematical data and labels are correctly designated on this plat; that all monuments depicted on this plat have been, or will be correctly set within one year; that all water boundaries and wet lands, as defined in Minnesota Statutes, Section 505.01, Subd. 3, as of the date of this certificate are shown and labeled on this plat; and all public ways are shown and labeled on this plat.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Kyle A. Domek, Land Surveyor  
Minnesota License No. 62734

STATE OF MINNESOTA  
COUNTY OF \_\_\_\_\_

This instrument was acknowledged before me on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by Kyle A. Domek.

\_\_\_\_\_  
(Signature) (Name Printed)

Notary Public, \_\_\_\_\_ County, Minnesota

My Commission Expires \_\_\_\_\_

CITY COUNCIL, CITY OF LAKEVILLE, COUNTY OF DAKOTA, STATE OF MINNESOTA

This plat was approved by the City Council of Lakeville, Minnesota, this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, and hereby certifies compliance with all requirements as set forth in Minnesota Statutes, Section 505.03. Subd. 2.

\_\_\_\_\_  
Mayor Clerk

COUNTY SURVEYOR, COUNTY OF DAKOTA, STATE OF MINNESOTA

I hereby certify that in accordance with Minnesota Statutes, Section 505.021, Subd. 11, this plat has been reviewed and approved this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Todd B. Tollefson  
Dakota County Surveyor

COUNTY BOARD OF COMMISSIONERS, COUNTY OF DAKOTA, STATE OF MINNESOTA

We do hereby certify that on the 3rd day of January, 2024 the Board of Commissioners of Dakota County, Minnesota approved this plat of NORTH RYAN SECOND ADDITION and said plat is in compliance with the provisions of Minnesota Statutes, Section 505.03, Sub. 2 and pursuant to the Dakota County Contiguous Plat Ordinance.

\_\_\_\_\_  
Chair County Board County Treasurer–Auditor

DEPARTMENT OF PROPERTY TAXATION AND RECORDS, COUNTY OF DAKOTA, STATE OF MINNESOTA

Pursuant to Minnesota Statutes, Section 505.021, Sub. 9, taxes payable in the year 20\_\_ on the land hereinbefore described have been paid. Also pursuant to Minnesota Statutes, Section 272.12, there are no delinquent taxes and transfer entered this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Amy A. Koethe  
Director of Department of Property Taxation and Records

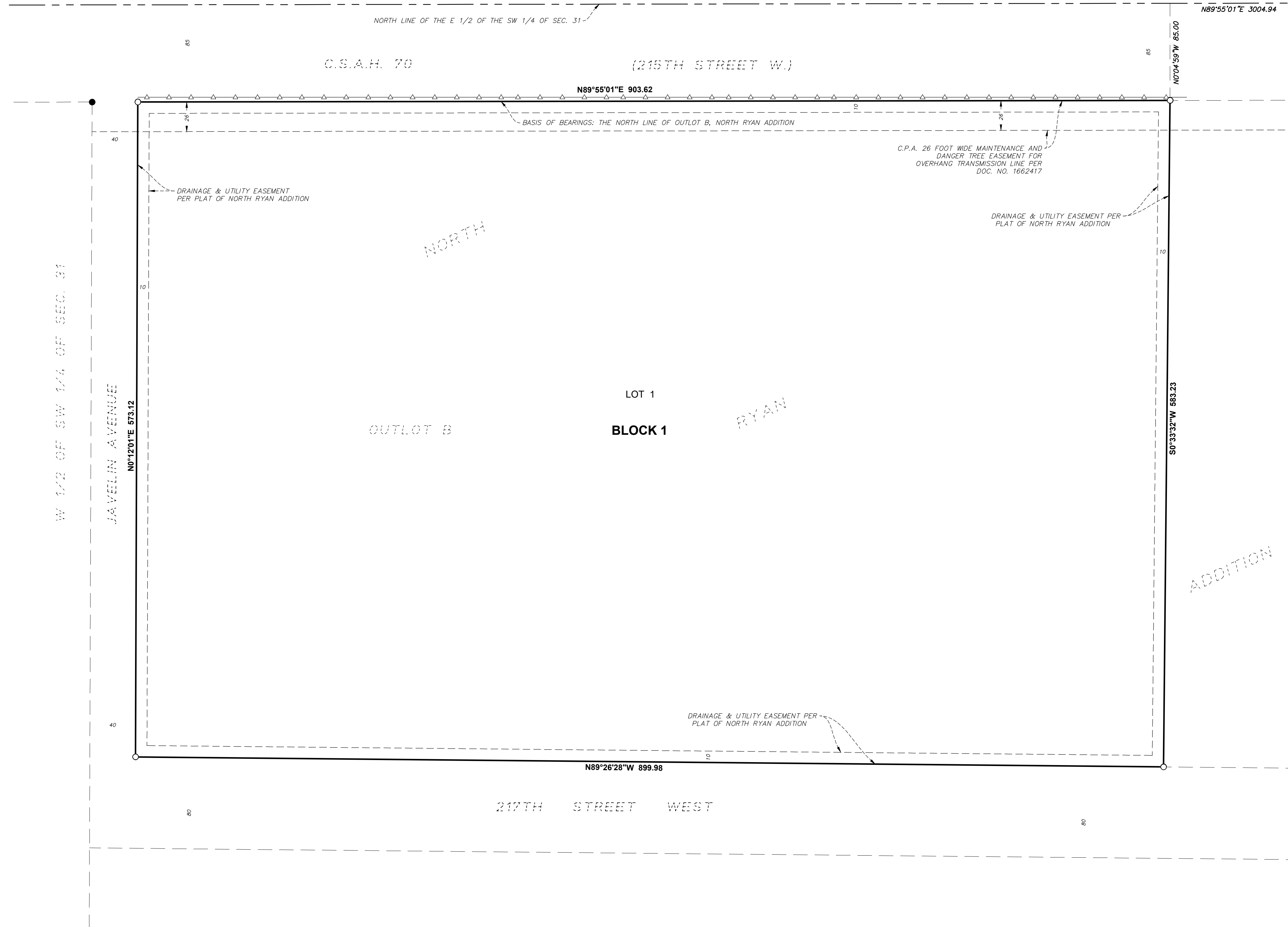
COUNTY RECORDER, COUNTY OF DAKOTA, STATE OF MINNESOTA

I hereby certify that this plat of NORTH RYAN SECOND ADDITION was filed in the office of the County Recorder for public record on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ at \_\_\_\_ o'clock \_\_M. and was duly recorded in Book \_\_\_\_\_ of \_\_\_\_\_ on page \_\_\_\_\_, as Document Number \_\_\_\_\_.

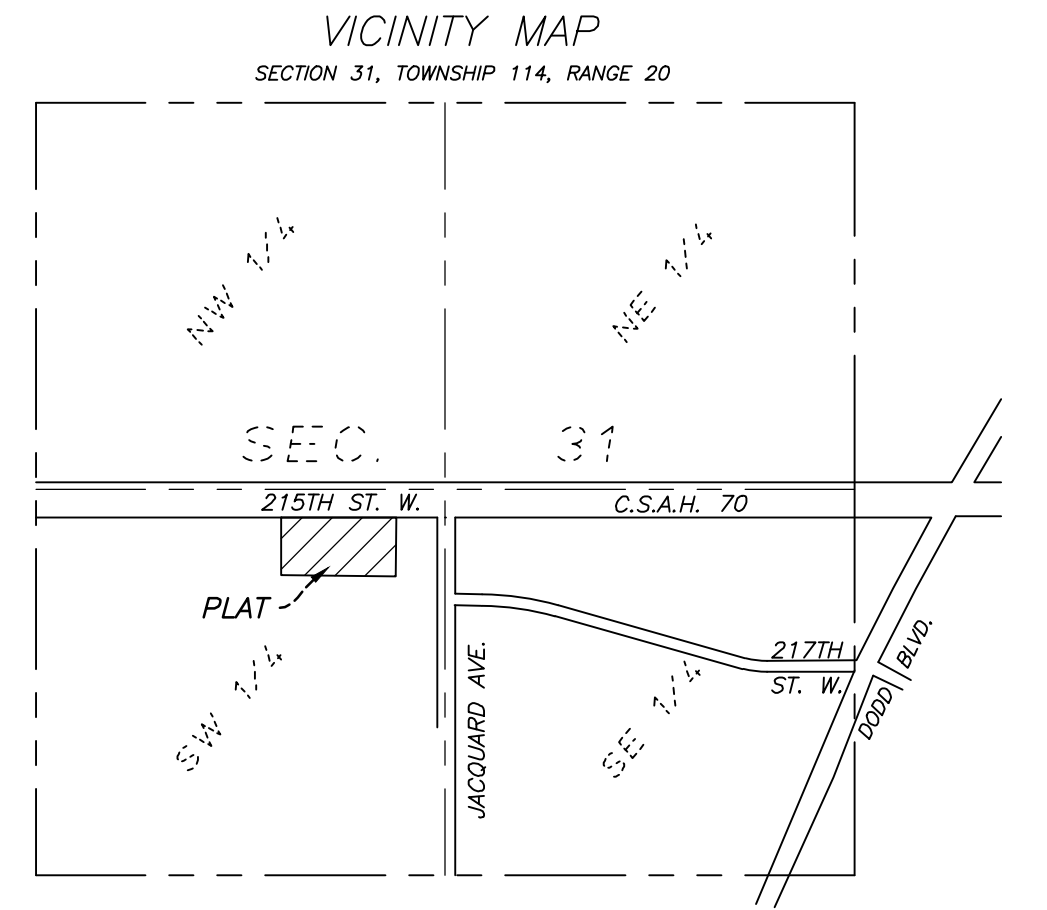
\_\_\_\_\_  
Amy A. Koethe  
County Recorder



# NORTH RYAN SECOND ADDITION

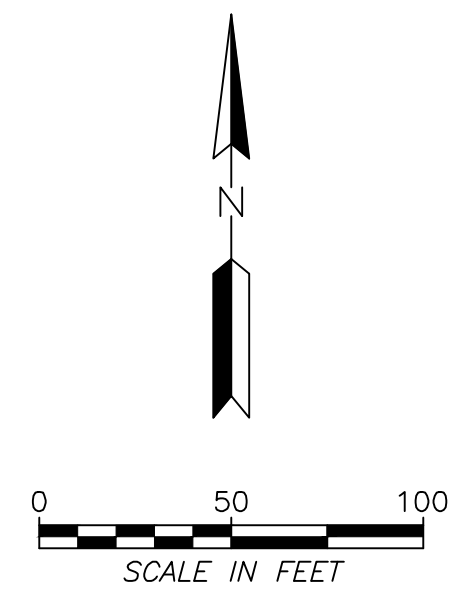


EAST QUARTER CORNER OF SEC 31 T 114 R 20 DAKOTA CAST IRON MONUMENT



BEARING ORIENTATION NOTE:  
THE NORTH LINE OF OUTLOT B, NORTH RYAN ADDITION, IS ASSUMED TO BEAR N89°55'01\"E.

- LEGEND**
- DENOTES IRON MONUMENT FOUND
  - DENOTES 1/2 INCH X 14 INCH IRON MONUMENT SET WITH PLASTIC CAP MARKED WITH LICENSE NO. 62734
  - △—△—△— DENOTES RESTRICTED ACCESS TO DAKOTA COUNTY PER DOCUMENT NO. 3552035



# PRELIMINARY PLAT OF NORTH RYAN SECOND ADDITION

## LEGAL DESCRIPTION OF PROPERTY TO BE PLATTED

Outlot B, NORTH RYAN ADDITION, Dakota County, Minnesota.

## PRESENT ADDRESS

THE SUBJECT PROPERTY ADDRESS:  
10222 215TH STREET WEST, LAKEVILLE, MINNESOTA 55044  
PROPERTY ID - 22-52090-00-020

## TAXPAYER / PROPERTY OWNER

SCANNELL PROPERTIES #648, LLC  
8801 RIVER CROSSING BLVD. STE. 300  
INDIANAPOLIS, IN 46240

## LAND SURVEYOR

STANTEC  
1 CARLSON PARKWAY, SUITE 100  
PLYMOUTH, MN 55447  
STEVEN F. HOUGH,  
MN. LICENSE NUMBER 54850

## DATE OF PRELIMINARY PLAT

OCTOBER 31, 2023

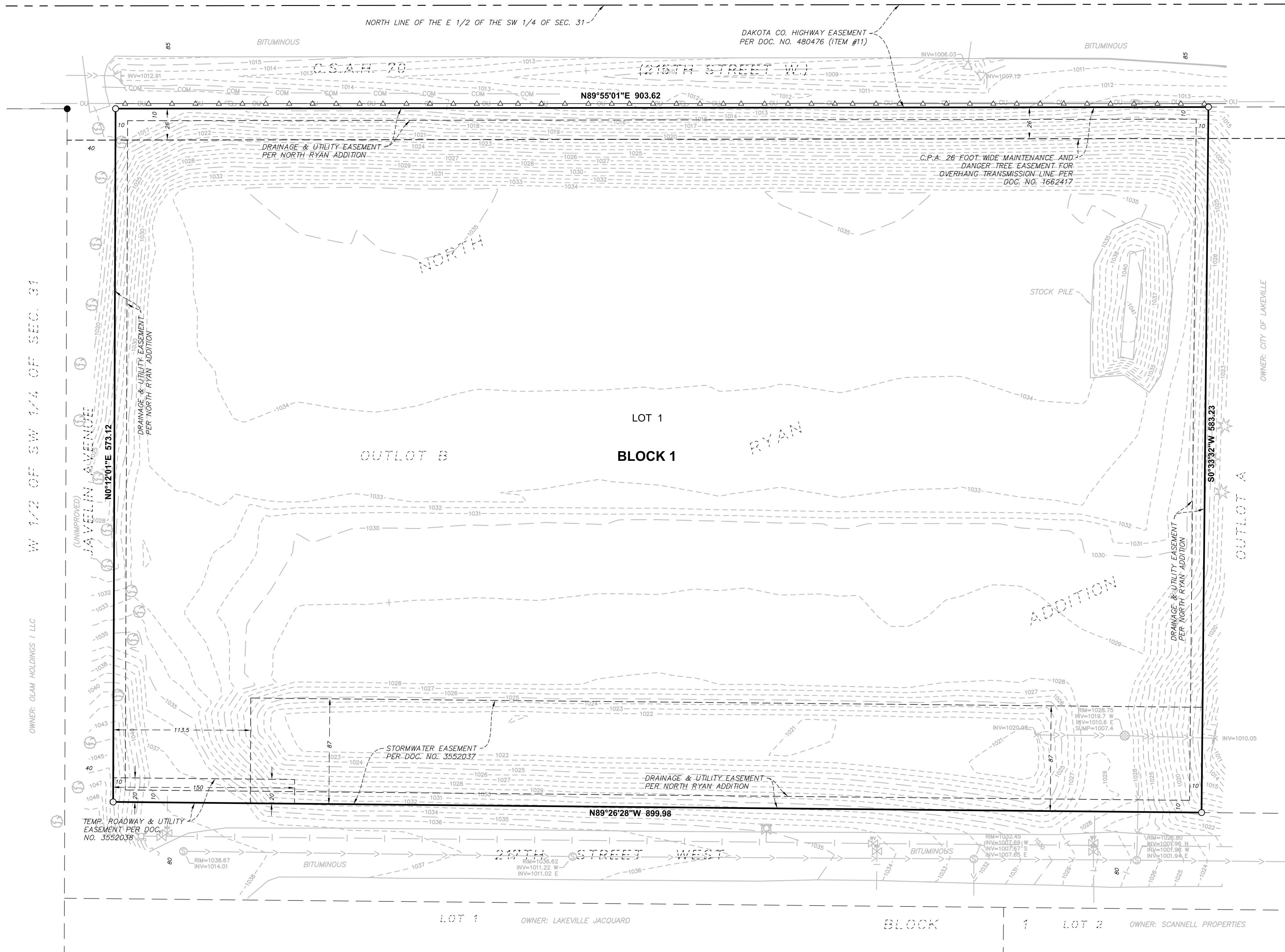
## PLATTED AREAS

LOT 1, BLOCK 1 = 521,390± S.F. OR 11.97± ACRES

## SURVEYORS CERTIFICATION

I HEREBY CERTIFY THAT THIS SURVEY, PLAN OR REPORT WAS PREPARED BY ME OR UNDER MY DIRECT SUPERVISION AND THAT I AM A DULY LICENSED LAND SURVEYOR UNDER THE LAWS OF THE STATE OF MINNESOTA.

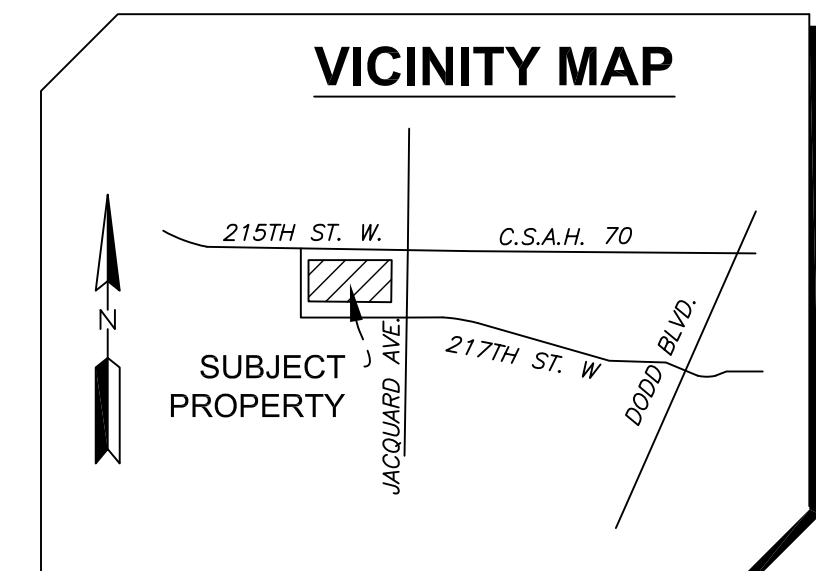
*Steven F. Hough* 10/31/2023  
Steven F. Hough Date  
MN LS 54850



### LEGEND

- |   |                  |  |
|---|------------------|--|
| ○ SET 1/2" x 14" IRON PIPE WITH PLASTIC CAP 54850 | ⊕ TRAFFIC SIGN   | —>—> STORM SEWER   |
| ● FOUND MONUMENT                                  | ⊖ UTILITY POLE   | —>— SANITARY SEWER   |
| ⊙ SANITARY SEWER MANHOLE                          | ⊖ ANCHOR CABLE   | — WATERMAIN  |
| ⊙ STORM SEWER MANHOLE                             | ⊙ LIGHT POLE     | — COM UNDERGROUND COMMUNICATION LINE   |
| ⊙ STORM SEWER INLET                               | ⊙ DECIDUOUS TREE | — OU OVERHEAD UTILITY LINE   |
| ⊙ STORM SEWER INLET                               | ⊙ WATER VALVE    | — TREE LINE  |
| ⊙ HYDRANT   |                  | — RESTRICTED ACCESS TO DAKOTA COUNTY PER THE DAKOTA COUNTY CONTIGUOUS PLAT ORDINANCE |
| ⊙ GAS METER                                       |                  |  |
| ⊙ COMMUNICATIONS PEDESTAL                         |                  |  |

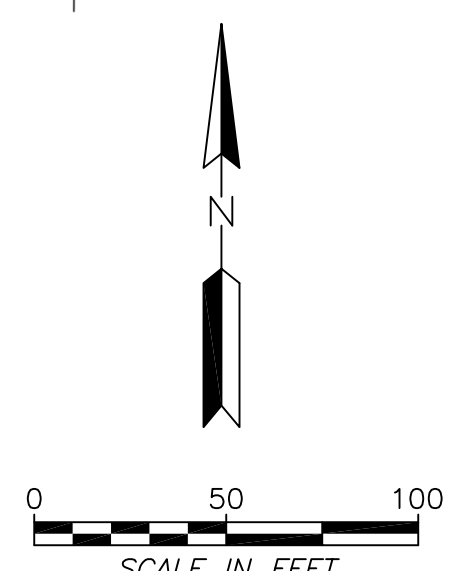
## EXHIBIT D



### GENERAL NOTES

- Bearings shown hereon are based on the Dakota County Coordinate System relative to the NAD83(11) control adjustment.
- Elevations and contours shown hereon were established with GPS and are relative to the NAVD88 vertical datum.

	CLIENT NAME	DAKOTA COUNTY	PROJECT TITLE	PRELIMINARY PLAT
	DWN BY SFH	CHK'D SFH	APP'D SFH	DWG DATE SEE CERT. SCALE SEE SCALE BAR
	PROJECT NO.	SHEET NO. 1 OF 1		









# Memorandum

**To:** Tina Goodroad, Community Development Director  
**From:** Heather Botten, Senior Planner  
**Date:** January 8, 2025  
**Subject:** North Ryan Second Addition Final Plat

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## BACKGROUND

Dakota County has submitted an application and plans for the final plat of North Ryan Second Addition. The City Council approved the preliminary plat and conditional use permit on January 16, 2024. The property is located south of 215<sup>th</sup> Street (CSAH 70), north of 217<sup>th</sup> Street and west of Jacquard Avenue and totals 11.97 acres. The applicant is proposing a development of a 17,770 square foot Dakota County recycling facility referred to as Recycle Zone Plus. The plans identify a possible future building expansion. The property is platted as Outlot B, North Ryan Addition and is zoned OP, Office Park District. The conditional use permit was required to allow a warehouse facility in the OP, Office Park District.

## EXHIBITS:

- A. Aerial Photo Location Map
- B. Final Plat
- C. Preliminary Pat
- D. Site Plan
- E. Grading and Drainage Plan

## PLANNING ANALYSIS

### FINAL PLAT

**Existing Conditions.** The property consists of 11.97 acres and was platted as Outlot B, North Ryan Addition in 2022. The property was preliminary graded for future development in 2022 in conjunction with the North Ryan Addition plat.

**Surrounding Land Uses.** Proposed North Ryan Second Addition is surrounded by the following existing or planned land uses:

Direction	Existing Use	Land Use Plan	Zoning
North	215 <sup>th</sup> Street (CSAH 70), South Creek Greenway	Restricted Development, Public and Quasi-Public	P-OS, Public and Open Space District
South	217 <sup>th</sup> Street and Magnum Trucking Warehouse	Warehouse/Light Industrial	I-1, Light Industrial District
East	Outlot A, North Ryan Addition and Jacquard Avenue	Office Park	OP, Office Park District
West	Undeveloped Agricultural Property	Office Park and Warehouse/Light Industrial	OP and I-1 Districts

**Lots/Blocks.** One lot on one block is proposed with the final plat. No outlots are proposed. Proposed Lot 1 exceeds the minimum lot area (30,000 square feet) and lot width (100 feet) requirements of the OP District.

**Access.** The property will be accessed via two driveways from 217<sup>th</sup> Street. The main service/drop-off access will be located on the east side of the property with the driveway wrapping around the north side of the building to the drop-off areas on the north and west sides of the building. The west drop-off area will include a covered canopy and a by-pass lane west of the canopy. Driveway access to 217<sup>th</sup> Street meets Zoning Ordinance requirements for location, setback and width.

**Grading, Drainage, Erosion Control, Utilities.** Grading, drainage, erosion control, and utility plans have been submitted with the North Ryan Second Addition final plat and are discussed in more detail in the January 8, 2026 engineering report.

**Tree Preservation.** There are no trees within the North Ryan Second Addition final plat area.

**Wetlands.** There are no wetlands within the North Ryan Second Addition final plat. A wetland delineation was completed in 2020. No wetlands were identified on the subject property.

**Park Dedication, Trails and Sidewalks.** The City’s Comprehensive Parks, Trails, and Open Space Plan does not identify any future park land needs in the area of the plat.

## SITE PLAN ANALYSIS

The site development and construction plans proposes a 17,770 square feet of office and recycle facility space. The site plan includes an on-site garage for County related equipment and an attendant station prior to entering the drop-off area.

The proposed final plat plans are consistent with the approved preliminary plat as outlined below.

**Setbacks.** The building setback requirements of the OP District are being met with the proposed site plans for Lot 1, Block 1 as follows:

<b>Required Building Setbacks</b>	<b>Proposed Building Setbacks</b>
Front Yard (north)-- 50 feet	Front (north - 215 <sup>th</sup> St.) – 250+ feet
Side Yard (east) - 10 feet	Side (east) – 450+ feet
Side Yard (west) - 30 feet	Side (west – Javelin Ave) – 350+ feet
Rear Yard (south)—30 feet	Rear (217 <sup>th</sup> St. south) – 130+ feet

**Parking.** The parking is consistent with the approved preliminary plat plans. The parking lot and internal driveways comply with OP, Office Park District setback requirements to the public street right-of-way and five feet internal property line setbacks.

**Circulation.** All drive aisles and parking stalls comply with the required aisle width and parking stall dimensions for one way 60-degree angled parking. All driveways, loading dock areas and trailer parking spaces are of adequate size to accommodate two-way traffic as well as backing and turning movements including for semi-trucks, trailers, and emergency vehicles.

**Outdoor Storage.** Outside storage will include compactors, trailers for appliances and mattresses as well as four – 30 cubic yard bulk waste and scrap metal bins. These facilities will be located approximately 120 feet from 215<sup>th</sup> Street (CSAH 70) and screened with landscaping near the north property line in addition to a 15-20 foot raised grade from the surface of 215<sup>th</sup> Street. Outdoor storage is limited to 20% of the gross lot area, which equals 41,544 square feet of the 12 acre property. The proposed outdoor storage area is approximately 30,000 square feet.

**Landscaping/Screening.** The OP District requires a minimum of 30% of the lot to remain as grass including shrubbery and plantings. The landscape plan as designed proposes over 60% greenspace on the 12-acre lot. The proposed landscaping provides screening on all four sides of the site. All landscaped areas within and adjacent to the parking lot, including landscaped islands, shall be irrigated in compliance with Zoning Ordinance requirements. All areas not

planted with trees, shrubs or perennials will be seeded with a natural grass mixture as shown on the landscape plan. All landscaping shall be kept in living condition with dead or diseased materials replaced as needed to comply with the approved landscape plan.

A landscape security shall be submitted with the final plat to guarantee installation of the approved landscaping. The security amount will be determined by the developer's landscaping contractor prior to City Council consideration of the final plat.

**Building Height/Exterior Materials.** The proposed building will be one-story, about 30 feet, in compliance with OP District requirements. It will be constructed of pre-cast concrete panels accented with narrow pre-finished metal panels on the west elevation below the canopy at the drive-through drop-off area. The exterior building materials comply with Zoning Ordinance requirements for the OP District.

**Snow Storage.** Snow storage may not take place in required parking spaces.

## RECOMMENDATION

Community Development Department staff has determined that the final plat and site development plans comply with Subdivision and Zoning Ordinance requirements. Staff recommends approval of the North Ryan Second Addition final plat subject to the following stipulations:

1. The recommendations listed in the Engineering Division memorandum dated January 8, 2026.
2. The site and building shall be developed and constructed consistent with zoning ordinance requirements and the site development plans approved by the City Council with the preliminary and final plat.
3. A landscaping financial security shall be submitted for Lot 1 with the final plat.
4. All signs shall comply with Zoning Ordinance requirements for the OP District. A sign permit shall be issued by the Community Development Department prior to the installation of any signs.
5. Snow storage shall not occur on required parking spaces. If there is not adequate space to store snow on site, snow must be removed from the site.



# Memorandum

**To:** Heather Botten, Senior Planner

**From:** Alanna Sobottka, Civil Engineer  
McKenzie L. Cafferty, Environmental Resources Manager  
Joe Masiarchin, Parks and Recreation Director

**Copy:** Zach Johnson, City Engineer  
Julie Stahl, Finance Director  
Dave Mathews, Building Official  
Tina Goodroad, Community Development Director

**Date:** January 8, 2026

**Subject:** North Ryan Second Addition

- Final Plat Review
- Site Plan Review
- Grading and Erosion Control Plan Review
- Utility Plan Review

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## **BACKGROUND**

Dakota County has submitted a final plat of one lot named North Ryan Second Addition and plans to construct a waste recycling facility on the lot. The proposed development is located west of Jacquard Avenue and south of and adjacent to 215<sup>th</sup> Street (CSAH 70). The parent parcel consists of Outlot B, North Ryan Addition (PID No. 225209000020) zoned OP, Office Park District.

The final plat consists of one lot within one block on 11.97 acres.

The proposed development will be completed by:

Developer:	Dakota County
Engineer/Surveyor:	LHB, Corp

## **SITE CONDITIONS**

The North Ryan Second Addition site was mass graded with the plat of North Ryan Addition. The land generally slopes from the west to the east.

## **EASEMENTS**

Several easements for highway, stormwater, and utility purposes exist across the parent parcel and will remain with the development improvements. A privately owned electric power transmission line easement exists along the northern edge of the lot. There are public perimeter drainage and utility easements and a stormwater and utility easement along the south property line. The public easements previously vacated with the preliminary plat will be reestablished with the final plat.

## **STREET AND SUBDIVISION LAYOUT**

### **215<sup>th</sup> Street (CSAH 70)**

North Ryan Second Addition is located south of and adjacent to 215<sup>th</sup> Street, a Principal Arterial roadway as identified in the City's Comprehensive Transportation Plan. The Dakota County Plat Commission reviewed the proposed development at its December 6, 2023 meeting and recommended approval. The current Dakota County Plat Review Needs Map identifies 215<sup>th</sup> Street as a 4-lane divided roadway with a half right-of-way requirement of 75-feet adjacent to the plat. The Developer dedicated the necessary right-of-way for 215<sup>th</sup> Street with the North Ryan Addition plat.

Dakota County and the City reconstructed 215<sup>th</sup> Street as a four-lane divided roadway adjacent to the plat in 2021. Dakota County controls the right-of-way requirements and access locations along 215<sup>th</sup> Street.

### **217<sup>th</sup> Street**

217<sup>th</sup> Street is a minor collector roadway as identified in the City's Transportation Plan and was constructed with the North Ryan Addition as a rural section roadway to promote infiltration and treatment of stormwater run-off. 217<sup>th</sup> Street is a 40-foot wide rural roadway with paved shoulders within an 80-foot right-of-way. The Developer dedicated the necessary right-of-way for 217<sup>th</sup> Street with the North Ryan Addition plat. 217<sup>th</sup> Street terminates in a temporary cul-de-sac; the developer of North Ryan Addition supplied a cash escrow for its removal when 217<sup>th</sup> Street is extended to the west.

### **Javelin Avenue**

Development of North Ryan Addition included the dedication of the ½ right-of-way for Javelin Avenue, located along the west plat boundary. Javelin Avenue will be constructed in the future to provide additional access to 215<sup>th</sup> Street. The access to 215<sup>th</sup> Street will be restricted to right-in/right-out in the future when it is constructed. North Ryan Second Addition should not be impacted upon construction of Javelin Avenue. Javelin Avenue will be constructed in the future

by the developer of the parcel to the west; the Developer for North Ryan Second Addition will be assessed for their portion of construction at the time of construction.

### **SITE PLAN**

A Site Plan was submitted for Lot 1, Block 1 North Ryan Second Addition. The Site Plan includes construction of a 17,770 SF waste recycling facility that will include warehouse/storage, office, and other employee related space and accessory buildings. The proposed site will result in a lot that is 31% impervious with 41 parking spaces. Access to the site is proposed via two private driveways on 217<sup>th</sup> Street. The site plan indicates areas of possible future expansion of the warehouse/storage space.

### **CONSTRUCTION ACCESS**

Construction traffic access and egress for grading, utility and street construction shall be determined with the final construction plans.

### **PARKS, TRAILS AND SIDEWALKS**

Park Dedication Fee is not required for this development.

Consistent with City and County transportation initiatives, a trail is planned adjacent to 215<sup>th</sup> Street. Timing of the trail construction will be discussed by City and County staff and programmed into future respective Capital Improvement Plans/Programs. The trail costs will be shared, consistent with adopted Dakota County Transportation Plan Cost Participation Policies at the time of construction.

### **UTILITIES**

#### **SANITARY SEWER**

North Ryan Second Addition is located within sub-district SC-10410 of the South Creek sanitary sewer district as identified in the City's Comprehensive Sewer Plan. The wastewater from the proposed site will be conveyed by City-owned sanitary sewer facilities to the Elko/New Market interceptor and then to the Empire Wastewater Treatment Plant. The existing City-owned downstream facilities are adequate to convey the wastewater generated by the proposed development.

Private sanitary sewer service hookups were extended from the public sanitary sewer to the south side of the subject parcel for development of the property with the development of North Ryan Addition.

The Sanitary Sewer Availability Charge will be required to be paid with the building permit application.

Final sewer service connection locations and sizes will be reviewed by City staff with the final construction plans.

**WATERMAIN**

A service stub was provided with the development of North Ryan Addition from the 12-inch watermain along 217<sup>th</sup> Street within the City’s Normal Pressure Zone.

The Lateral Watermain Access Charge must be paid for the 16-inch watermain along 215<sup>th</sup> Street that was installed with City Project 20-05. The Lateral Watermain Access Charge for the watermain adjacent to North Ryan Second Addition must be paid with the final plat, calculated as follows:

902.50 ft.	x \$48.00/f.f.	= \$43,320.00
Applicable Front Footage of North Ryan Second Addition	Non-Residential Charge Per Front Foot	Lateral Watermain Access Charge Required With North Ryan Second Addition

Final locations and sizes of watermain facilities will be reviewed by City staff with the final plat, building permit application and final construction plans.

**OVERHEAD LINES**

Great River Energy (GRE) has an existing electric transmission line along 215<sup>th</sup> Street. The transmission line is not required to be buried due to being a high voltage line.

**DRAINAGE AND GRADING**

North Ryan Second Addition is located within subdistrict SC-007 and SC-022 of the South Creek District of the City’s Comprehensive Water and Natural Resources Management Plan.

Development of North Ryan Second Addition includes the construction of multiple privately owned and maintained stormwater management basins within Lot 1, Block 1. Prior to final plat approval, the final grading plan must be reviewed to be consistent with City Ordinance requirements.

The final grading plan shall identify all fill lots in which the building footings will be placed on fill material. The grading specifications shall also indicate that all embankments meet FHA/HUD 79G specifications. The Developer shall certify to the City that all lots with footings placed on fill material are appropriately constructed. Building Certificates of Occupancy will not be issued until a soils report and an as-built certified grading plan have been submitted and approved by City staff.

North Ryan Second Addition contains more than one acre of site disturbance. A National Pollution Discharge Elimination System General Stormwater Permit for construction activity is required from the Minnesota Pollution Control Agency for areas exceeding one acre being disturbed by grading. A copy of the Notice of Stormwater Permit Coverage must be submitted to the City upon receipt from the MPCA.

**STORM SEWER**

Development of North Ryan Second Addition includes the construction of privately owned and maintained storm sewer systems to be located within Lot 1, Block 1 and will collect and convey stormwater runoff generated from within the development to the stormwater management basins.

The Storm Sewer Area Charge has not been collected on the parent parcel and must be paid with the final plat, calculated as follows:

521,413.20 s.f.	x \$0.250/s.f.	= \$130,353.30
Net Area of North Ryan Second Addition	Area Charge	Storm Sewer Area Charge Required With North Ryan Second Addition

Final locations and sizes of all storm sewer facilities will be reviewed by City staff with the building permit application and final construction plans.

**FEMA FLOODPLAIN ANALYSIS**

North Ryan Second Addition is shown on the Flood Insurance Rate Map (FIRM) as Zone X by the Federal Emergency Management Agency (FEMA). Based on this designation by FEMA, the plat is not located within a Special Flood Hazard Area (SFHA).

**WETLANDS**

A wetland delineation report was completed and approved in 2020. No wetlands were identified within the project area.

**TREE PRESERVATION**

The site was mass graded with North Ryan Addition. No additional trees are planned to be removed with this phase.

**EROSION CONTROL**

The Developer is responsible for obtaining a MPCA Construction Permit for the site as well as maintaining the SWPPP for the site during construction. The permit requires that any changes made throughout construction must be documented in the SWPPP.

A maintenance schedule for the establishment of vegetation in the basins must be submitted to the City for review prior to the start of grading. Additional erosion control measures may be required during construction as deemed necessary by City staff. Any additional measures required shall be installed and maintained by the developer.

**NORTH RYAN SECOND ADDITION – FINAL PLAT**

**JANUARY 8, 2026**

**PAGE 6 OF 8**

The MS4 Administration Fee has not been collected on the parent parcel and must be paid with the final plat, calculated as follows:

\$717,147.69	x 2%	= \$14,342.95
Project Grading Cost of North Ryan Second Addition	MS4 Admin Fee	MS4 Admin Fee Required With North Ryan Second Addition

**SECURITIES**

The Developer shall provide a Letter of Credit as security for the Developer-installed improvements relating to North Ryan Second Addition. Construction costs are based upon estimates submitted by the Developer’s engineer on February 13, 2025.

**CONSTRUCTION COSTS**

Sanitary Sewer	\$ 5,000.00
Watermain	7,106.40
Storm Sewer	73,693.05
Street Construction	8,409.95
Grading, Drainage, Erosion Control and Restoration	138,299.07
<b>SUBTOTAL - CONSTRUCTION COSTS</b>	<hr/> <b>\$ 232,508.47</b>

**OTHER COSTS**

Developer’s Design (3.0%)	\$ 6,975.25
Developer’s Construction Survey (2.5%)	5,812.71
City’s Legal Expense (0.5%)	1,162.54
City Construction Observation (5.0%)	11,625.42
Developer’s Record Drawing (0.5%)	1,162.54
Landscaping	92,000.00
Streetlights	1,400.00
Lot Corners/Iron Monuments	100.00
<b>SUBTOTAL - OTHER COSTS</b>	<hr/> <b>\$120,238.46</b>
<b>TOTAL PROJECT SECURITY</b>	<hr/> <b>\$352,746.93</b>

The street light security totals \$1,400 which consists of one (1) mast-arm streetlight at \$1,400 each.

The Developer shall post a security to ensure the final placement of iron monuments at property corners with the final plat. The security is \$100.00 per lot and outlot for a total of \$100.00. The City shall hold this security until the Developer’s Land Surveyor certifies that all irons have been placed following site grading, street and utility construction.

**NORTH RYAN SECOND ADDITION – FINAL PLAT**

**JANUARY 8, 2026**

**PAGE 7 OF 8**

**CASH FEES**

A cash fee for one-year of streetlight operating expenses shall be paid at the time of final plat approval and is calculated as follows:

$$\begin{array}{r r r r r} 902.50 \text{ ft.} & & \times \$0.2974/\text{front foot/qtr} & \times 4 \text{ qtrs/yr} & = \$1,073.61 \\ \text{Applicable Front Footage of} & & \text{Streetlight Operating Fee} & & \text{Total} \\ \text{North Ryan Second Addition} & & & & \end{array}$$

A cash fee for one-year of environmental resources expenses shall be paid at the time of final plat approval and is calculated as follows:

$$\begin{array}{r r r r r} 1 \text{ unit} & & \times \$64.00/\text{unit} & \times 4.2 & = \$268.80 \\ \text{Total Units} & & \text{Environmental Resources Fee} & \text{Classification Factor} & \text{Total} \\ \text{In North Ryan Second Addition} & & & \text{- Industrial} & \end{array}$$

A cash fee for the preparation of addressing, property data, record construction drawings and for updating the City base map shall be paid at the time of final plat approval and is calculated as follows:

$$\begin{array}{r r r r r} 1 \text{ unit} & & \times \$90.00/\text{unit} & & = \$90.00 \\ \text{Lots/Outlots} & & \text{Property Data \& Asset/Infrastructure Mgmt Fee} & & \text{Total} \end{array}$$

The Developer shall submit the final plat and construction drawings in an electronic format. The electronic format shall be in .pdf and either .dwg/.dxf or .shx format.

The Developer shall also pay a cash fee for City Engineering Administration. The fee for City Engineering Administration will be based on three percent (3.00%) of the estimated construction cost, or \$6,975.25.

**CASH REQUIREMENTS**

Storm Sewer Area Charge	\$130,353.30
Lateral Watermain Access Charge	43,320.00
MS4 Administration Fee	14,342.95
Streetlight Operating Fee	1,073.61
Environmental Resources Management Fee	268.80
Property Data & Asset/Infrastructure Mgmt Fee	90.00
City Engineering Administration (3.00%)	6,975.25
<b>TOTAL - CASH REQUIREMENTS</b>	<b>\$196,423.91</b>

**RECOMMENDATION**

**NORTH RYAN SECOND ADDITION – FINAL PLAT**

**JANUARY 8, 2026**

**PAGE 8 OF 8**

Engineering recommends approval of the final plat, site plan, grading and erosion control plan, and utility plan for North Ryan Second Addition, subject to the requirements and stipulations within this report.



**Date:** 1/20/2026

## **2026 Community Development Block Grant Application**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to adopt a resolution authorizing the submittal of the 2026 Community Development Block Grant (CDBG) application in the amount of \$138,523.

### **Overview**

Dakota County is expected to receive approximately \$1.89 million of the federal allocation for the Community Development Block Grant program. This amount is divided between 14 cities, as well as a consortium of townships and small cities throughout Dakota County.

The City has been informed that it will be receiving approximately \$138,523 in Community Development Block Grant funding in program year 2026. Use of these funds is contingent upon the City submitting and receiving approval of an application to the Dakota County Community Development Agency (CDA) that identifies activities that meet at least one of the federal objectives of either benefiting low/moderate income persons, eliminating slum and blight or for planning purposes. At least 50% of the proposed activities for 2026 must be activities or projects that provide benefit to low/moderate income (LMI) individuals. A breakout of the recommended allocation for program year 2026 is included in Attachment A.

In 2026, CDBG funds are proposed to be used to provide programming to seniors at the Heritage Center, provide assistance to Lakeville seniors with outdoor chores and minor home repairs, fund the Lakeville LOOP (a weekly circulator bus service for Lakeville seniors), and make ADA compliance improvements at the Heritage Center. Additionally, the Home Improvement Loan program will be used to assist qualifying residents in need of home improvements by providing interest-free loans.

### **Supporting Information**

1. PY2026 CDBG Application \_Lakeville 1.20.26
2. CDBG application resolution \_Lakeville PY26
3. PY26 CDBG Attachment A
4. Estimated FY 2026 funds letter \_LV

<b>Financial Impact:</b> \$138,523 <b>Budgeted:</b> No <b>Source:</b> Community Development Block Grant
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**Envision Lakeville Community Values: A Home for All Ages and Stages of Life**  
**Report Completed by: Kati Bachmayer, Economic Development Manager**



# COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS APPLICATION FOR PROGRAM YEAR 2026

Application must be received by the Dakota County Community Development Agency  
**NO LATER THAN FRIDAY, JANUARY 16, 2026**  
For July 1, 2026 – June 30, 2027

## General Information

Applicant Name: City of Lakeville	UEI #: KL8UN7NHZAS3
Contact Name: Tina Goodroad, Community Development Director	
Applicant Address: 20195 Holyoke Ave	
City, State, Zip: Lakeville MN 55044	
Phone: 952-985-4421	Email: tgoodroad@lakevillemn.gov

## Proposed Activities

Activity	Requested Funding Amount
#1 Title: Housing Rehabilitation Loan Program	CDBG Request: \$9,540
#2 Title: Senior Transportation	CDBG Request: \$ 35,000
#3 Title: Senior Services	CDBG Request: \$ 13,483
#4 Title: ADA Compliance	CDBG Request: \$ 80,500
#5 Title:	CDBG Request: \$ <a href="#">Click or tap here to enter text.</a>
Total Request: \$ 138,523	

## Contingency Funding Request:

**Note the funding levels for activities if there is an increase or decrease in federal funding levels. Specify which activities should be fully funded at the requested level and which should be increased or decreased. Fully fund senior transportation. If necessary, decrease remaining activities.**

**PLEASE NOTE:** AT LEAST 50% of the proposed funding must qualify as a LOW/MOD benefit. NO MORE THAN 35% of the any one community's proposed funding can be for PUBLIC SERVICES. Because public services may not account for more than 15% of the County's total funding, public service requests may be

decreased once all applications are submitted and reviewed by CDA staff. NO MORE than 10% of any one community's funding can be used for PLANNING.

**Certification**

I certify that the information contained in this application is true and correct and that it contains no misrepresentations, falsifications, intentional omissions, or concealment of material facts. I further certify that no contracts have been awarded, funds committed, or construction begun on the proposed project(s), and that none will be made prior to notification from the Dakota County CDA based on HUD's issuance of a Release of Funds Notice.

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title of Authorized Official

**PLEASE ATTACH THE RESOLUTION OF THE GOVERNING BODY SHOWING APPROVAL  
OF THE REQUEST FOR CDBG FUNDS.**

## I. Activity Title

Please complete the following Sections I-V for EACH proposed activity. (For example, if 3 activities are being proposed, there will be 3 sets of the following pages.)

Activity # 1

Activity Title: Housing Rehabilitation Loan Program

## II. Activity Information

**Describe the proposed activity in detail. Please be specific about purpose, location, number of people or households served, etc.**

The Housing Rehabilitation Loan Program provides interest free loans in amounts up to \$35,000 to homeowners in Lakeville who meet equity and credit requirements and low/moderate income requirements. Those who qualify for the Housing Rehabilitation Loan Program will benefit from the structural integrity of the redevelopment of their properties. Residents and the City will also benefit from the increased market value and subsequent increased tax revenues generated from improved properties. The City of Lakeville is committed to supporting the continued viability of existing residential structures and neighborhoods throughout the entire community.

The Housing Rehabilitation Loan Program will provide a minimum of \$15,000 and a maximum of \$35,000 loans to low/moderate income individuals that would be deferred until the sale of the property at which time repayment of the loan would be expected in full. The loans provide for necessary improvements to the home to maintain the quality of the housing stock in the community. This is a city-wide program. In 2024, Lakeville was estimated to have 27,803 housing units and 26,631 households. This PY26 activity requested fund amount would be combined with the previous fiscal year activity to reach the minimum loan amount of \$15,000.

Has this Activity received CDBG funding before?  Yes  No

Check the eligible activity category of the proposed activity: (See attached definitions)

<p><b>Affordable Rental Housing</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Rehabilitation of Multi-Unit Residential</li> <li><input type="checkbox"/> Fair Housing Activities</li> <li><input type="checkbox"/> Energy Efficiency Improvements</li> </ul>	<p><b>Public Services</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Senior Services</li> <li><input type="checkbox"/> Youth Services</li> <li><input type="checkbox"/> Transportation Services</li> <li><input type="checkbox"/> Operational Support</li> </ul>
<p><b>Affordable Homeowner Housing</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Homeownership Assistance</li> <li><input type="checkbox"/> New (Re)Construction Homeowner Housing</li> <li><input checked="" type="checkbox"/> Rehabilitation/ Energy Efficiency Improvement of Single Unit Residential</li> <li><input type="checkbox"/> Fair Housing Activities</li> </ul>	<p><b>Public Facilities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Recreational Parks</li> <li><input type="checkbox"/> Public Water/Sewer Improvements</li> <li><input type="checkbox"/> Street Improvements</li> <li><input type="checkbox"/> Sidewalks</li> <li><input type="checkbox"/> Assessment Abatement</li> <li><input type="checkbox"/> ADA Improvements</li> </ul>
<p><b>Homelessness</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Coordinated Access to Services &amp; Shelter</li> <li><input type="checkbox"/> Housing Stabilization</li> <li><input type="checkbox"/> Emergency Shelter Operation</li> </ul>	<p><b>Neighborhood Revitalization</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Acquisition of Real Property</li> <li><input type="checkbox"/> Clearance and Demolition</li> <li><input type="checkbox"/> Clean-up of Contaminated Site</li> </ul>
<p><b>Economic Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employment Training</li> <li><input type="checkbox"/> Economic Development Assistance</li> <li><input type="checkbox"/> Rehabilitation of Commercial/Industrial Buildings</li> <li><input type="checkbox"/> Micro-Enterprise Assistance</li> <li><input type="checkbox"/> Relocation</li> </ul>	<p><b>Planning and Administration</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Planning</li> <li><input type="checkbox"/> Administration</li> </ul>

**Describe the activity schedule:**

Is this a continuation of a previously funded activity?  Yes  No

Is this a time-specific project?  Yes  No

If this is a time-specific project, please note the start and end dates below:

Proposed Activity Start Date: Ongoing

Proposed Activity Completion Date: Ongoing

**III. CDBG National Objective**

**CDBG funded projects/activities must meet one of the following program objectives. Check the objective for which the CDBG funds will be used.**

- Low/Mod Area Benefit
- Low/Mod Housing Benefit
- Slum/Blight Area Benefit
- Urgent Need (extremely rare; used only for emergencies): *(Please explain)* [Click or tap here to enter text.](#)
- Low/Mod Limited Clientele Benefit
- Low/Mod Jobs Benefit
- Slum/Blight Spot Benefit

**If you checked the Low/Mod Area Benefit box, please answer the following:**

In what Census Tract/Block Group(s) do beneficiaries of your Activity live? *(Please include map)*  
[Click or tap here to enter text.](#)

How many residents live in this area? [Click or tap here to enter text.](#)

What is the percentage of low and moderate-income beneficiaries? [Click or tap here to enter text.%](#)

How was this documented?  HUD Data  Survey  
*(Please include a copy of survey)*

**If you checked the Low/Mod Housing Benefit box, please answer the following:**

How many Low/Mod Households will benefit? 1 Households  
*(Income eligibility must be verified by written documentation)*

Where will this activity occur? *(Address of property, neighborhood, or citywide)*  
Citywide

**If you checked the Low/Mod Limited Clientele Benefit box, please answer the following:**

How many Low/Mod People or Households will benefit? [Click or tap here to enter text.](#) People [Click or tap here to enter text.](#) Households (Please choose either People or Households for each project).

How will income be verified?

- Income Verification Request Forms
- Eligibility Status for other Governmental Assistance program
- Self Certification (Must request source documentation of 20% of certifications and must inform beneficiary that all sources of income and assets must be included when calculating annual income)
- Presumed benefit (HUD presumes the following to be low and moderate-income: abused children, battered spouses, elderly persons (62+), severely disabled persons, homeless persons, persons living with AIDS, migrant farm workers)

**If you checked the Low/Mod Jobs Benefit box, please answer the following:**

To meet the requirements of the "Jobs" National Objective, the business being assisted must enter into an agreement showing commitment that at least 51% of jobs created or retained will be available to low/mod income persons. The business must also be prepared to provide a list of all jobs, detailed information about the jobs being created or retained, the selection and hiring process, and demographic information about the employees.

Will this activity create or retain full time equivalencies (FTEs)?  Create  Retain

For job(s) that are being retained, please provide evidence that the assisted business has issued a notice to affected employees or that the business has made a public announcement to that effect, OR an analysis of relevant financial records that shows the business is likely to cut back on employment in the near future without planned intervention.

Will the job(s) created or retained require a special skill?  Yes  No

What percent of permanent FTEs will be held by or available to low/mod income persons? [Click or tap here to enter text.](#) %

**If you checked the Slum/Blight Area or Slum/Blight Spot Benefit box, please answer the following:**

What are the boundaries of the slum/blight area or the address of the slum/blight spot? [Click or tap here to enter text.](#)

(Please provide letter from building inspector or other documentation noting deficiencies and include photos)

What deficiency will be corrected or the public improvement be? [Click or tap here to enter text.](#)

If Slum/Blight Area, what percent of buildings are deteriorated? [Click or tap here to enter text.](#)%

#### IV. Proposed Objectives and Outcomes

Indicate the proposed objective and outcome of the activity/project.

	<b>Outcome #1 Availability/Accessibility</b>	<b>Outcome #2 Affordability</b>	<b>Outcome #3 Sustainability</b>
<b>Objective #1 Suitable Living Environment</b>	<input type="checkbox"/> Accessibility for the purpose of creating a suitable living environment	<input type="checkbox"/> Affordability for the purpose of creating a suitable living environment	<input checked="" type="checkbox"/> Sustainability for the purpose of creating a suitable living environment
<b>Objective #2 Decent Housing</b>	<input type="checkbox"/> Accessibility for the purpose of providing decent housing	<input type="checkbox"/> Affordability for the purpose of providing decent housing	<input checked="" type="checkbox"/> Sustainability for the purpose of providing decent housing
<b>Objective #3 Economic Opportunity</b>	<input type="checkbox"/> Accessibility for the purpose of creating economic opportunities	<input type="checkbox"/> Affordability for the purpose of creating economic opportunities	<input type="checkbox"/> Sustainability for the purpose of creating economic opportunities

Indicate how the activity outcome will be measured and projected number of beneficiaries.

- People \_\_\_\_\_
  Public Facilities \_\_\_\_\_
  Businesses \_\_\_\_\_
- Households 1
 Jobs \_\_\_\_\_
  Organizations \_\_\_\_\_
- Housing Units \_\_\_\_\_

#### V. Project Budget

Provide the total project cost and CDBG request.

Total Project Cost: \$ 15,000

Total CDBG Request: \$ 9,540

CDBG Percent of Total Cost: 100%

Describe all funding sources.

<b>Source of Funds</b>	<b>Amount</b>	<b>Committed</b>	<b>Pending</b>
CDBG PY26	\$ 9,540	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CDBG PY25	\$ 5,460	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Click or tap here to enter text.	\$ Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>
Total:	\$ 15,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Please itemize project expenses, using the following guidance as applicable:**

- Acquisition & Improvement Costs - Include purchase price, closing costs, site improvements, clearance of toxic contaminants, and other acquisition and improvement costs
- Construction/Rehabilitation Costs - Include site improvements, construction (labor, materials, supplies), installation, permits and other construction/rehabilitation costs
- Professional Fees and Personnel Costs - Include architectural, engineering and code inspection fees, surveys, appraisals, legal fees, hazardous materials surveys, project management, and other professional/personnel fees
- Other Development Costs - Include relocation, financing costs, environmental reviews, environmental studies, and other development costs
- Eligible Costs for Planning Projects - Include professional services, project management costs, and other planning costs

<b>Itemized Use of Funds/Expenses</b>	<b>Costs</b>	<b>CDBG Funds Requested</b>	<b>Other Funding Sources</b>
Construction/rehabilitation costs	\$ 15,000	\$ 9,540	\$ 5,460
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
<b>Total:</b>	\$ 15,000	\$ 9,540	\$ 5,460

\* \* \* \* \*

***Please review each section for completeness.  
Each activity should have separate Sections I through V.***

**I. Activity Title**

**Please complete the following Sections I-V for EACH proposed activity. (For example, if 3 activities are being proposed, there will be 3 sets of the following pages.)**

**Activity #** 2

**Activity Title:** Senior Transportation

**II. Activity Information**

**Describe the proposed activity in detail. Please be specific about purpose, location, number of people or households served, etc.**

The City of Lakeville has a subrecipient agreement with DARTS to provide circulator bus service to senior citizens (age 62 and older), people with disabilities, and individuals who qualify based on income. Bus service runs one day a week for five hours per day. It provides rides at a reasonable, all-you-can-ride day fare to seniors at seven senior housing facilities and four manufactured home parks and takes them to various locations in the city. This senior transportation service is known as the Lakeville LOOP and has nearly 130 riders registered for the program.

**Has this Activity received CDBG funding before?**                       Yes                       No

**Check the eligible activity category of the proposed activity:** *(See attached definitions)*

<p><b>Affordable Rental Housing</b></p> <p><input type="checkbox"/> Rehabilitation of Multi-Unit Residential</p> <p><input type="checkbox"/> Fair Housing Activities</p> <p><input type="checkbox"/> Energy Efficiency Improvements</p>	<p><b>Public Services</b></p> <p><input checked="" type="checkbox"/> Senior Services</p> <p><input type="checkbox"/> Youth Services</p> <p><input checked="" type="checkbox"/> Transportation Services</p> <p><input type="checkbox"/> Operational Support</p>
<p><b>Affordable Homeowner Housing</b></p> <p><input type="checkbox"/> Homeownership Assistance</p> <p><input type="checkbox"/> New (Re)Construction Homeowner Housing</p> <p><input type="checkbox"/> Rehabilitation/ Energy Efficiency Improvement of Single Unit Residential</p> <p><input type="checkbox"/> Fair Housing Activities</p>	<p><b>Public Facilities</b></p> <p><input type="checkbox"/> Recreational Parks</p> <p><input type="checkbox"/> Public Water/Sewer Improvements</p> <p><input type="checkbox"/> Street Improvements</p> <p><input type="checkbox"/> Sidewalks</p> <p><input type="checkbox"/> Assessment Abatement</p> <p><input type="checkbox"/> ADA Improvements</p>
<p><b>Homelessness</b></p> <p><input type="checkbox"/> Coordinated Access to Services &amp; Shelter</p> <p><input type="checkbox"/> Housing Stabilization</p> <p><input type="checkbox"/> Emergency Shelter Operation</p>	<p><b>Neighborhood Revitalization</b></p> <p><input type="checkbox"/> Acquisition of Real Property</p> <p><input type="checkbox"/> Clearance and Demolition</p> <p><input type="checkbox"/> Clean-up of Contaminated Site</p>
<p><b>Economic Development</b></p> <p><input type="checkbox"/> Employment Training</p> <p><input type="checkbox"/> Economic Development Assistance</p> <p><input type="checkbox"/> Rehabilitation of Commercial/Industrial Buildings</p> <p><input type="checkbox"/> Micro-Enterprise Assistance</p> <p><input type="checkbox"/> Relocation</p>	<p><b>Planning and Administration</b></p> <p><input type="checkbox"/> Planning</p> <p><input type="checkbox"/> Administration</p>

**Describe the activity schedule:**

Is this a continuation of a previously funded activity?  Yes  No

Is this a time-specific project?  Yes  No

If this is a time-specific project, please note the start and end dates below:

Proposed Activity Start Date: Ongoing

Proposed Activity Completion Date: Ongoing

### III. CDBG National Objective

**CDBG funded projects/activities must meet one of the following program objectives. Check the objective for which the CDBG funds will be used.**

- |  |   |
|--|---|
| <input type="checkbox"/> Low/Mod Area Benefit  | <input checked="" type="checkbox"/> Low/Mod Limited Clientele Benefit |
| <input type="checkbox"/> Low/Mod Housing Benefit   | <input type="checkbox"/> Low/Mod Jobs Benefit                         |
| <input type="checkbox"/> Slum/Blight Area Benefit  | <input type="checkbox"/> Slum/Blight Spot Benefit                     |
| <input type="checkbox"/> Urgent Need (extremely rare; used only for emergencies): <i>(Please explain)</i> <a href="#">Click or tap here to enter text.</a> |   |

**If you checked the Low/Mod Area Benefit box, please answer the following:**

In what Census Tract/Block Group(s) do beneficiaries of your Activity live? *(Please include map)*  
[Click or tap here to enter text.](#)

How many residents live in this area? [Click or tap here to enter text.](#)

What is the percentage of low and moderate-income beneficiaries? [Click or tap here to enter text.](#)%

How was this documented?  HUD Data  Survey  
*(Please include a copy of survey)*

**If you checked the Low/Mod Housing Benefit box, please answer the following:**

How many Low/Mod Households will benefit? [Click or tap here to enter text.](#) Households  
*(Income eligibility must be verified by written documentation)*

Where will this activity occur? *(Address of property, neighborhood, or citywide)*  
[Click or tap here to enter text.](#)

**If you checked the Low/Mod Limited Clientele Benefit box, please answer the following:**

How many Low/Mod People or Households will benefit? 100+ People [Click or tap here to enter text.](#) Households *(Please choose either People or Households for each project).*

How will income be verified?

- Income Verification Request Forms
- Eligibility Status for other Governmental Assistance program
- Self Certification *(Must request source documentation of 20% of certifications and must inform beneficiary that all sources of income and assets must be included when calculating annual income)*
- Presumed benefit *(HUD presumes the following to be low and moderate-income: abused children, battered spouses, elderly persons (62+), severely disabled persons, homeless persons, persons living with AIDS, migrant farm workers)*

**If you checked the Low/Mod Jobs Benefit box, please answer the following:**

*To meet the requirements of the "Jobs" National Objective, the business being assisted must enter into an agreement showing commitment that at least 51% of jobs created or retained will be available to low/mod income persons. The business must also be prepared to provide a list of all jobs, detailed information about the jobs being created or retained, the selection and hiring process, and demographic information about the employees.*

Will this activity create or retain full time equivalencies (FTEs)?  Create  Retain  
*For job(s) that are being retained, please provide evidence that the assisted business has issued a notice to affected employees or that the business has made a public announcement to that effect, OR an analysis of relevant financial records that shows the business is likely to cut back on employment in the near future without planned intervention.*

Will the job(s) created or retained require a special skill?  Yes  No

What percent of permanent FTEs will be held by or available to low/mod income persons? [Click or tap here to enter text.](#) %

**If you checked the Slum/Blight Area or Slum/Blight Spot Benefit box, please answer the following:**

What are the boundaries of the slum/blight area or the address of the slum/blight spot? [Click or tap here to enter text.](#)

*(Please provide letter from building inspector or other documentation noting deficiencies and include photos)*

What deficiency will be corrected or the public improvement be? [Click or tap here to enter text.](#)

If Slum/Blight Area, what percent of buildings are deteriorated? [Click or tap here to enter text.](#)%

#### IV. Proposed Objectives and Outcomes

Indicate the proposed objective and outcome of the activity/project.

	<b>Outcome #1 Availability/Accessibility</b>	<b>Outcome #2 Affordability</b>	<b>Outcome #3 Sustainability</b>
<b>Objective #1 Suitable Living Environment</b>	<input checked="" type="checkbox"/> Accessibility for the purpose of creating a suitable living environment	<input type="checkbox"/> Affordability for the purpose of creating a suitable living environment	<input type="checkbox"/> Sustainability for the purpose of creating a suitable living environment
<b>Objective #2 Decent Housing</b>	<input type="checkbox"/> Accessibility for the purpose of providing decent housing	<input type="checkbox"/> Affordability for the purpose of providing decent housing	<input type="checkbox"/> Sustainability for the purpose of providing decent housing
<b>Objective #3 Economic Opportunity</b>	<input type="checkbox"/> Accessibility for the purpose of creating economic opportunities	<input type="checkbox"/> Affordability for the purpose of creating economic opportunities	<input type="checkbox"/> Sustainability for the purpose of creating economic opportunities

Indicate how the activity outcome will be measured and projected number of beneficiaries.

- People 100+
 Public Facilities \_\_\_\_\_
  Businesses \_\_\_\_\_  
 Households \_\_\_\_\_
  Jobs \_\_\_\_\_
  Organizations \_\_\_\_\_  
 Housing Units \_\_\_\_\_

#### V. Project Budget

Provide the total project cost and CDBG request.

Total Project Cost: \$ 35,000

Total CDBG Request: \$ 35,000

CDBG Percent of Total Cost: 100%

Describe all funding sources.

<b>Source of Funds</b>	<b>Amount</b>	<b>Committed</b>	<b>Pending</b>
CDBG PY26	\$ 35,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Click or tap here to enter text.	\$ Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>
Click or tap here to enter text.	\$ Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total:</b>	<b>\$ 35,000</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Please itemize project expenses, using the following guidance as applicable:**

- Acquisition & Improvement Costs - Include purchase price, closing costs, site improvements, clearance of toxic contaminants, and other acquisition and improvement costs
- Construction/Rehabilitation Costs - Include site improvements, construction (labor, materials, supplies), installation, permits and other construction/rehabilitation costs
- Professional Fees and Personnel Costs - Include architectural, engineering and code inspection fees, surveys, appraisals, legal fees, hazardous materials surveys, project management, and other professional/personnel fees
- Other Development Costs - Include relocation, financing costs, environmental reviews, environmental studies, and other development costs
- Eligible Costs for Planning Projects - Include professional services, project management costs, and other planning costs

Itemized Use of Funds/Expenses	Costs	CDBG Funds Requested	Other Funding Sources
Bus service	\$ 35,000	\$ 35,000	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
<b>Total:</b>	\$ 35,000	\$ 35,000	\$ Click or tap here to enter text.

\* \* \* \* \*

***Please review each section for completeness.  
Each activity should have separate Sections I through V.***

## I. Activity Title

Please complete the following Sections I-V for EACH proposed activity. (For example, if 3 activities are being proposed, there will be 3 sets of the following pages.)

Activity # 3

Activity Title: Senior Services

## II. Activity Information

**Describe the proposed activity in detail. Please be specific about purpose, location, number of people or households served, etc.**

The City of Lakeville values living options for people of all ages and stages of life and strives to be a community where residents can age in place. This Community Value aligns with Dakota County's Homes for a Lifetime initiative, which gives aging residents the ability to live in their own homes for as long as safely, confidently, and comfortably possible.

The Senior Services program offers reduced rates to seniors (age 62 and older) in order to expand accessibility and reduce barriers to participation in Lakeville Heritage Center membership and programming. Lakeville Parks and Recreation staff served over 500 seniors in 2025, by paying for applicants' eligible activities.

This activity will also provide assistance to Lakeville seniors by paying for eligible DARTS Outdoor Chores and Minor Home Repair services. The Outdoor Chores program assists Lakeville senior residents (62 and older) with home maintenance chores such as snow removal, lawn mowing, weeding gardens and small tree and shrub trimming. Minor Home Repair services assist seniors with safety and accessibility solutions, as well as providing more aesthetic solutions like minor painting jobs and power washing. Over 80 seniors were helped by these services in 2025.

Has this Activity received CDBG funding before?  Yes  No

Check the eligible activity category of the proposed activity: *(See attached definitions)*

<p><b>Affordable Rental Housing</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Rehabilitation of Multi-Unit Residential</li> <li><input type="checkbox"/> Fair Housing Activities</li> <li><input type="checkbox"/> Energy Efficiency Improvements</li> </ul>	<p><b>Public Services</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Senior Services</li> <li><input type="checkbox"/> Youth Services</li> <li><input type="checkbox"/> Transportation Services</li> <li><input type="checkbox"/> Operational Support</li> </ul>
<p><b>Affordable Homeowner Housing</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Homeownership Assistance</li> <li><input type="checkbox"/> New (Re)Construction Homeowner Housing</li> <li><input type="checkbox"/> Rehabilitation/ Energy Efficiency Improvement of Single Unit Residential</li> <li><input type="checkbox"/> Fair Housing Activities</li> </ul>	<p><b>Public Facilities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Recreational Parks</li> <li><input type="checkbox"/> Public Water/Sewer Improvements</li> <li><input type="checkbox"/> Street Improvements</li> <li><input type="checkbox"/> Sidewalks</li> <li><input type="checkbox"/> Assessment Abatement</li> <li><input type="checkbox"/> ADA Improvements</li> </ul>
<p><b>Homelessness</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Coordinated Access to Services &amp; Shelter</li> <li><input type="checkbox"/> Housing Stabilization</li> <li><input type="checkbox"/> Emergency Shelter Operation</li> </ul>	<p><b>Neighborhood Revitalization</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Acquisition of Real Property</li> <li><input type="checkbox"/> Clearance and Demolition</li> <li><input type="checkbox"/> Clean-up of Contaminated Site</li> </ul>
<p><b>Economic Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employment Training</li> <li><input type="checkbox"/> Economic Development Assistance</li> <li><input type="checkbox"/> Rehabilitation of Commercial/Industrial Buildings</li> <li><input type="checkbox"/> Micro-Enterprise Assistance</li> <li><input type="checkbox"/> Relocation</li> </ul>	<p><b>Planning and Administration</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Planning</li> <li><input type="checkbox"/> Administration</li> </ul>

**Describe the activity schedule:**

Is this a continuation of a previously funded activity?  Yes  No

Is this a time-specific project?  Yes  No

If this is a time-specific project, please note the start and end dates below:

Proposed Activity Start Date: Ongoing

Proposed Activity Completion Date: Ongoing

**III. CDBG National Objective**

**CDBG funded projects/activities must meet one of the following program objectives. Check the objective for which the CDBG funds will be used.**

- Low/Mod Area Benefit
- Low/Mod Housing Benefit
- Slum/Blight Area Benefit
- Urgent Need (extremely rare; used only for emergencies): *(Please explain)* [Click or tap here to enter text.](#)
- Low/Mod Limited Clientele Benefit
- Low/Mod Jobs Benefit
- Slum/Blight Spot Benefit

**If you checked the Low/Mod Area Benefit box, please answer the following:**

In what Census Tract/Block Group(s) do beneficiaries of your Activity live? *(Please include map)*  
[Click or tap here to enter text.](#)

How many residents live in this area? [Click or tap here to enter text.](#)

What is the percentage of low and moderate-income beneficiaries? [Click or tap here to enter text.%](#)

How was this documented?  HUD Data  Survey  
*(Please include a copy of survey)*

**If you checked the Low/Mod Housing Benefit box, please answer the following:**

How many Low/Mod Households will benefit? [Click or tap here to enter text.](#) Households  
*(Income eligibility must be verified by written documentation)*

Where will this activity occur? *(Address of property, neighborhood, or citywide)*  
[Click or tap here to enter text.](#)

**If you checked the Low/Mod Limited Clientele Benefit box, please answer the following:**

How many Low/Mod People or Households will benefit? 500+ People [Click or tap here to enter text.](#) Households *(Please choose either People or Households for each project).*

How will income be verified?

- Income Verification Request Forms
- Eligibility Status for other Governmental Assistance program
- Self Certification *(Must request source documentation of 20% of certifications and must inform beneficiary that all sources of income and assets must be included when calculating annual income)*
- Presumed benefit *(HUD presumes the following to be low and moderate-income: abused children, battered spouses, elderly persons (62+), severely disabled persons, homeless persons, persons living with AIDS, migrant farm workers)*

**If you checked the Low/Mod Jobs Benefit box, please answer the following:**

*To meet the requirements of the "Jobs" National Objective, the business being assisted must enter into an agreement showing commitment that at least 51% of jobs created or retained will be available to low/mod income persons. The business must also be prepared to provide a list of all jobs, detailed information about the jobs being created or retained, the selection and hiring process, and demographic information about the employees.*

Will this activity create or retain full time equivalencies (FTEs)?  Create  Retain

*For job(s) that are being retained, please provide evidence that the assisted business has issued a notice to affected employees or that the business has made a public announcement to that effect, OR an analysis of relevant financial records that shows the business is likely to cut back on employment in the near future without planned intervention.*

Will the job(s) created or retained require a special skill?  Yes  No

What percent of permanent FTEs will be held by or available to low/mod income persons? [Click or tap here to enter text.](#) %

**If you checked the Slum/Blight Area or Slum/Blight Spot Benefit box, please answer the following:**

What are the boundaries of the slum/blight area or the address of the slum/blight spot? [Click or tap here to enter text.](#)

*(Please provide letter from building inspector or other documentation noting deficiencies and include photos)*

What deficiency will be corrected or the public improvement be? [Click or tap here to enter text.](#)

If Slum/Blight Area, what percent of buildings are deteriorated? [Click or tap here to enter text.](#)%

#### IV. Proposed Objectives and Outcomes

Indicate the proposed objective and outcome of the activity/project.

	<b>Outcome #1 Availability/Accessibility</b>	<b>Outcome #2 Affordability</b>	<b>Outcome #3 Sustainability</b>
<b>Objective #1 Suitable Living Environment</b>	<input type="checkbox"/> Accessibility for the purpose of creating a suitable living environment	<input type="checkbox"/> Affordability for the purpose of creating a suitable living environment	<input checked="" type="checkbox"/> Sustainability for the purpose of creating a suitable living environment
<b>Objective #2 Decent Housing</b>	<input type="checkbox"/> Accessibility for the purpose of providing decent housing	<input type="checkbox"/> Affordability for the purpose of providing decent housing	<input checked="" type="checkbox"/> Sustainability for the purpose of providing decent housing
<b>Objective #3 Economic Opportunity</b>	<input type="checkbox"/> Accessibility for the purpose of creating economic opportunities	<input type="checkbox"/> Affordability for the purpose of creating economic opportunities	<input type="checkbox"/> Sustainability for the purpose of creating economic opportunities

Indicate how the activity outcome will be measured and projected number of beneficiaries.

- People 500+
 Public Facilities \_\_\_\_\_
  Businesses \_\_\_\_\_  
 Households \_\_\_\_\_
  Jobs \_\_\_\_\_
  Organizations \_\_\_\_\_  
 Housing Units \_\_\_\_\_

#### V. Project Budget

Provide the total project cost and CDBG request.

Total Project Cost: \$ 20,000

Total CDBG Request: \$ 13,483

CDBG Percent of Total Cost: 67.4%

Describe all funding sources.

<b>Source of Funds</b>	<b>Amount</b>	<b>Committed</b>	<b>Pending</b>
CDBG	\$ 13,483	<input type="checkbox"/>	<input checked="" type="checkbox"/>
City of Lakeville	\$ 6,517	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Click or tap here to enter text.	\$ Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>
Total:	\$ 20,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Please itemize project expenses, using the following guidance as applicable:**

- Acquisition & Improvement Costs - Include purchase price, closing costs, site improvements, clearance of toxic contaminants, and other acquisition and improvement costs
- Construction/Rehabilitation Costs - Include site improvements, construction (labor, materials, supplies), installation, permits and other construction/rehabilitation costs
- Professional Fees and Personnel Costs - Include architectural, engineering and code inspection fees, surveys, appraisals, legal fees, hazardous materials surveys, project management, and other professional/personnel fees
- Other Development Costs - Include relocation, financing costs, environmental reviews, environmental studies, and other development costs
- Eligible Costs for Planning Projects - Include professional services, project management costs, and other planning costs

<b>Itemized Use of Funds/Expenses</b>	<b>Costs</b>	<b>CDBG Funds Requested</b>	<b>Other Funding Sources</b>
Senior Services (Heritage Center programming. Contracted outdoor chores services and minor home repair services)	\$ 20,000	\$ 13,483	\$ 6,517
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.	\$ Click or tap here to enter text.
<b>Total:</b>	\$20,000	\$ 13,483	\$ 6,517

\* \* \* \* \*

***Please review each section for completeness.  
Each activity should have separate Sections I through V.***

**I. Activity Title**

**Please complete the following Sections I-V for EACH proposed activity. (For example, if 3 activities are being proposed, there will be 3 sets of the following pages.)**

**Activity # 4**

**Activity Title: ADA Compliance Improvements**

**II. Activity Information**

**Describe the proposed activity in detail. Please be specific about purpose, location, number of people or households served, etc.**

The City has studied accessibility improvements to City facilities under the Americans with Disabilities Act (ADA) and is requesting funds to make ADA improvements at the Heritage Senior Center. Work will include remodeling all bathrooms and locker rooms, including installation of power-assist doors, in the building to meet ADA standards.

**Has this Activity received CDBG funding before?**       Yes       No

**Check the eligible activity category of the proposed activity: (See attached definitions)**

<b>Affordable Rental Housing</b> <input type="checkbox"/> Rehabilitation of Multi-Unit Residential <input type="checkbox"/> Fair Housing Activities <input type="checkbox"/> Energy Efficiency Improvements	<b>Public Services</b> <input type="checkbox"/> Senior Services <input type="checkbox"/> Youth Services <input type="checkbox"/> Transportation Services <input type="checkbox"/> Operational Support
<b>Affordable Homeowner Housing</b> <input type="checkbox"/> Homeownership Assistance <input type="checkbox"/> New (Re)Construction Homeowner Housing <input type="checkbox"/> Rehabilitation/ Energy Efficiency Improvement of Single Unit Residential <input type="checkbox"/> Fair Housing Activities	<b>Public Facilities</b> <input type="checkbox"/> Recreational Parks <input type="checkbox"/> Public Water/Sewer Improvements <input type="checkbox"/> Street Improvements <input type="checkbox"/> Sidewalks <input type="checkbox"/> Assessment Abatement <input checked="" type="checkbox"/> ADA Improvements
<b>Homelessness</b> <input type="checkbox"/> Coordinated Access to Services & Shelter <input type="checkbox"/> Housing Stabilization <input type="checkbox"/> Emergency Shelter Operation	<b>Neighborhood Revitalization</b> <input type="checkbox"/> Acquisition of Real Property <input type="checkbox"/> Clearance and Demolition <input type="checkbox"/> Clean-up of Contaminated Site
<b>Economic Development</b> <input type="checkbox"/> Employment Training <input type="checkbox"/> Economic Development Assistance <input type="checkbox"/> Rehabilitation of Commercial/Industrial Buildings <input type="checkbox"/> Micro-Enterprise Assistance <input type="checkbox"/> Relocation	<b>Planning and Administration</b> <input type="checkbox"/> Planning <input type="checkbox"/> Administration

**Describe the activity schedule:**

Is this a continuation of a previously funded activity?  Yes  No

Is this a time-specific project?  Yes  No

If this is a time-specific project, please note the start and end dates below:

Proposed Activity Start Date: July 2026

Proposed Activity Completion Date: June 2028

**III. CDBG National Objective**

**CDBG funded projects/activities must meet one of the following program objectives. Check the objective for which the CDBG funds will be used.**

- Low/Mod Area Benefit
- Low/Mod Housing Benefit
- Slum/Blight Area Benefit
- Urgent Need (extremely rare; used only for emergencies): *(Please explain)* [Click or tap here to enter text.](#)
- Low/Mod Limited Clientele Benefit
- Low/Mod Jobs Benefit
- Slum/Blight Spot Benefit

**If you checked the Low/Mod Area Benefit box, please answer the following:**

In what Census Tract/Block Group(s) do beneficiaries of your Activity live? *(Please include map)*  
[Click or tap here to enter text.](#)

How many residents live in this area? [Click or tap here to enter text.](#)

What is the percentage of low and moderate-income beneficiaries? [Click or tap here to enter text.%](#)

How was this documented?  HUD Data  Survey  
*(Please include a copy of survey)*

**If you checked the Low/Mod Housing Benefit box, please answer the following:**

How many Low/Mod Households will benefit? [Click or tap here to enter text.](#) Households  
*(Income eligibility must be verified by written documentation)*

Where will this activity occur? *(Address of property, neighborhood, or citywide)*  
[Click or tap here to enter text.](#)

**If you checked the Low/Mod Limited Clientele Benefit box, please answer the following:**

How many Low/Mod People or Households will benefit? Residents aged 62+ (approx. 6,000 people) People [Click or tap here to enter text.](#) Households *(Please choose either People or Households for each project).*

How will income be verified?

- Income Verification Request Forms
- Eligibility Status for other Governmental Assistance program
- Self Certification *(Must request source documentation of 20% of certifications and must inform beneficiary that all sources of income and assets must be included when calculating annual income)*
- Presumed benefit *(HUD presumes the following to be low and moderate-income: abused children, battered spouses, elderly persons (62+), severely disabled persons, homeless persons, persons living with AIDS, migrant farm workers)*

**If you checked the Low/Mod Jobs Benefit box, please answer the following:**

*To meet the requirements of the "Jobs" National Objective, the business being assisted must enter into an agreement showing commitment that at least 51% of jobs created or retained will be available to low/mod income persons. The business must also be prepared to provide a list of all jobs, detailed information about the jobs being created or retained, the selection and hiring process, and demographic information about the employees.*

Will this activity create or retain full time equivalencies (FTEs)?  Create  Retain  
*For job(s) that are being retained, please provide evidence that the assisted business has issued a notice to affected employees or that the business has made a public announcement to that effect, OR an analysis of relevant financial records that shows the business is likely to cut back on employment in the near future without planned intervention.*

Will the job(s) created or retained require a special skill?  Yes  No

What percent of permanent FTEs will be held by or available to low/mod income persons? [Click or tap here to enter text.](#) %

**If you checked the Slum/Blight Area or Slum/Blight Spot Benefit box, please answer the following:**

What are the boundaries of the slum/blight area or the address of the slum/blight spot? [Click or tap here to enter text.](#)

*(Please provide letter from building inspector or other documentation noting deficiencies and include photos)*

What deficiency will be corrected or the public improvement be? [Click or tap here to enter text.](#)

If Slum/Blight Area, what percent of buildings are deteriorated? [Click or tap here to enter text.](#)%

#### IV. Proposed Objectives and Outcomes

Indicate the proposed objective and outcome of the activity/project.

	<b>Outcome #1 Availability/Accessibility</b>	<b>Outcome #2 Affordability</b>	<b>Outcome #3 Sustainability</b>
<b>Objective #1 Suitable Living Environment</b>	<input checked="" type="checkbox"/> Accessibility for the purpose of creating a suitable living environment	<input type="checkbox"/> Affordability for the purpose of creating a suitable living environment	<input type="checkbox"/> Sustainability for the purpose of creating a suitable living environment
<b>Objective #2 Decent Housing</b>	<input type="checkbox"/> Accessibility for the purpose of providing decent housing	<input type="checkbox"/> Affordability for the purpose of providing decent housing	<input type="checkbox"/> Sustainability for the purpose of providing decent housing
<b>Objective #3 Economic Opportunity</b>	<input type="checkbox"/> Accessibility for the purpose of creating economic opportunities	<input type="checkbox"/> Affordability for the purpose of creating economic opportunities	<input type="checkbox"/> Sustainability for the purpose of creating economic opportunities

Indicate how the activity outcome will be measured and projected number of beneficiaries.

- People \_\_\_\_\_
- Households \_\_\_\_\_
- Housing Units \_\_\_\_\_
- Public Facilities  
Residents aged 62+ (approx.  
6,000 people)
- Jobs \_\_\_\_\_
- Businesses \_\_\_\_\_
- Organizations \_\_\_\_\_

## V. Project Budget

**Provide the total project cost and CDBG request.**

Total Project Cost: \$ 80,500

Total CDBG Request: \$ 80,500

CDBG Percent of Total Cost: 100%

**Describe all other funding sources.**

Source of Funds	Amount	Committed	Pending
CDBG	\$ 80,500	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Click or tap here to enter text.	\$	<input type="checkbox"/>	<input type="checkbox"/>
Click or tap here to enter text.	\$	<input type="checkbox"/>	<input type="checkbox"/>
Total:	\$ 80,500	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Please itemize project expenses, using the following guidance as applicable:**

- Acquisition & Improvement Costs - Include purchase price, closing costs, site improvements, clearance of toxic contaminants, and other acquisition and improvement costs
- Construction/Rehabilitation Costs - Include site improvements, construction (labor, materials, supplies), installation, permits and other construction/rehabilitation costs
- Professional Fees and Personnel Costs - Include architectural, engineering and code inspection fees, surveys, appraisals, legal fees, hazardous materials surveys, project management, and other professional/personnel fees
- Other Development Costs - Include relocation, financing costs, environmental reviews, environmental studies, and other development costs
- Eligible Costs for Planning Projects - Include professional services, project management costs, and other planning costs

Itemized Use of Funds/Expenses	Costs	CDBG Funds Requested	Other Funding Sources
ADA improvements to existing City facility	\$ 80,500	\$ 80,500	\$
Click or tap here to enter text.	\$	\$	\$
Click or tap here to enter text.	\$	\$	\$
Click or tap here to enter text.	\$	\$	\$
Click or tap here to enter text.	\$	\$	\$
Total:	\$80,500	\$ 80,500	\$

\* \* \* \* \*

***Please review each section for completeness.  
Each activity should have separate Sections I through V.***

## **COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) ELIGIBLE ACTIVITIES**

**Please Note:** *Although an activity may be deemed eligible for CDBG funding, it does not guarantee funding. The Community Development Needs for the CDBG Program in the Consolidated Plan lists the priority of needs and dictates which types of eligible activities may be funded in a given year. All activities must meet a National Objective.*

**CDBG funds may NOT be used for costs attributable to a building used for the general conduct of government, general government expenses, or political activities.**

**Acquisition/Disposition:** Includes acquisition of real property, in whole or in part, by purchase, long-term lease, donation, or otherwise for any public purpose. Real property to be acquired may include land, air rights, easements, water rights, rights-of-way, buildings and other property improvements, or other interests in real property.

**Demolition/Clearance:** Includes clearance, demolition, and removal of buildings and improvements including movement of structures to other sites.

**Economic Development Activities:** Includes but are not limited to: (1) construction by the grantee or subrecipient of a business incubator designed to provide inexpensive space and assistance to new firms to help them become viable businesses, (2) loans to pay for the expansion of a factory or commercial business, and (3) training for by persons on welfare to enable them to qualify for jobs created by CDBG-assisted special economic development activities. The level of public benefit to be derived from the economic development activity must be appropriate given the amount of CDBG assistance.

**Homeownership Assistance:** Includes financial assistance for down payments, closing costs or other part of the purchase process and counseling for pre-purchase, post-purchase or foreclosure prevention.

**Rehabilitation:** Includes single-family rehabilitation, multi-family rehabilitation, energy efficiency improvements, public housing modernization, and rehabilitation of commercial properties.

**Relocation:** Includes relocation payments and assistance to displaced persons, including individuals, families, businesses, non-profits, and farms, where required under section 570.606 of the regulations (pursuant to the Uniform Relocation Act).

**Public Facilities/Improvements:** CDBG funds may be used by the subrecipient or other public or private nonprofit entities for the acquisition (including long term leases for periods of 15 years or more), construction, reconstruction, rehabilitation (including removal of architectural barriers to accessibility), or installation, of public improvements or facilities. This includes neighborhood facilities, firehouses, public schools, libraries, and shelters for homeless people, as well as water and/or sewer treatment plants. Buildings for the general conduct of government cannot be acquired or improved with CDBG funds.

**Public Services:** CDBG funds may be used to provide public services (including labor, supplies, and materials), provided that each of the following criteria is met: 1) The public service must be either a new service or a quantifiable increase in the level of service; and 2) The amount of CDBG funds obligated within a program year to support public service activities may not exceed 35% of a city's allocation and the total public services of all subrecipients may not exceed 15% of the total grant awarded to Dakota County for that year.

**Planning:** Includes studies, analysis, data gathering, preparation of plans, and identification of actions that will implement plans. The types of plans which may be paid for with CDBG funds include but are not limited to comprehensive plans, individual project plans, community development plans, capital improvement programs, small area and neighborhood plans, environmental and historic preservation studies, and functional plans (such as plans for housing, land use, energy conservation, or economic development). Except for small cities and townships, the amount of CDBG funds obligated within a program year to support planning activities may not exceed 15% of a community's allocation.

**General Grant Administration:** CDBG funds may be used for general administration costs incurred by a subrecipient to administer its CDBG program. CDBG grant funds obligated to general grant administration may not exceed 10% of the community's allocation. Administration costs directly associated with a CDBG activity should be part of the activity as project

administration and are not considered general grant administration expenses. Please talk to the Dakota County CDA before you allocate funds to grant admin.

**Planning and General Grant Administration Activities may not exceed 20% of the total grant awarded to Dakota County for that year.**

**CITY OF LAKEVILLE  
DAKOTA COUNTY, MINNESOTA**

**RESOLUTION NO. \_\_\_\_\_**

**A RESOLUTION APPROVING THE APPLICATION  
FOR FISCAL YEAR 2026 DAKOTA COUNTY COMMUNITY DEVELOPMENT BLOCK  
GRANT FUNDING**

WHEREAS, the City of Lakeville is a participating jurisdiction with the Dakota County Community Development Block Grant (CDBG) Entitlement Program for Fiscal Year 2026 (starting July 1, 2026 and ending June 30, 2027); and

WHEREAS, the Dakota County Community Development Agency (CDA) is a Subgrantee of Dakota County for the administration of the CDBG Program; and

WHEREAS, the Dakota County CDA has requested Fiscal Year 2025 CDBG applications be submitted by January 16, 2026, based on an allocation of funds approved in the Annual Action Plan.

NOW, THEREFORE, BE IT RESOLVED that the City of Lakeville hereby approves the following:

1. The Fiscal Year 2026 CDBG application is approved for submission to the Dakota County CDA.
2. The Mayor for the City of Lakeville is authorized to execute the application and all agreements and documents related to receiving and using the awarded CDBG funds.
3. The Dakota County CDA is designated as the administrative entity to carry out the CDBG program on behalf of the City of Lakeville, subject to future Subrecipient Agreements that may be required for specific CDBG-funded activities.

ADOPTED this 20<sup>th</sup> day of January, 2026.

By: \_\_\_\_\_  
Luke M. Hellier, Mayor

ATTEST:

\_\_\_\_\_  
Ann Orlofsky, City Clerk

2026 CDBG Application

The Dakota County Community Development Agency (CDA) requires that all cities submit applications with at least 50% of the proposed allocation for PY2026 be activities or projects that provide benefit to low/moderate income (LMI) individuals. The CDA also requires that applications do not exceed 35% for public service activities and 10% for planning activities from the total proposed allocation.

One of the more commonly identified LMI activities in Dakota County is the Home Improvement Loan Program administered by the Dakota County CDA. Preservation of the existing residential neighborhoods adjacent to Downtown have been identified as a goal of the City Council in the Downtown Development Guide. Another area identified by staff is the Valley Park area, one of Lakeville’s older neighborhoods. Information about the program can be found at <https://www.dakotacda.org/housing-resources/homeownership/home-improvement-loan-program/>. Staff recommends funding this program at \$9,540.

The City of Lakeville has partnered with DARTS since late 2017 on the Lakeville LOOP, a senior circulator bus service that runs five hours a day for one day a week, which picks up residents at senior housing locations and manufactured home parks, and drops off at locations throughout Lakeville upon request. Over 130 rider registrations have been received since the LOOP’s inception. More information about the program can be found at <https://www.lakevillemn.gov/824/Lakeville-LOOP-Circulator-Bus>. The \$35,000 request will be used to continue the service into 2026.

Senior Services has been a very popular program at the Heritage Center, serving over 500 seniors in 2025. Since 2018, the City of Lakeville has partnered with DARTS to fund outdoor chores and minor home repairs services to senior citizens under this CDBG activity. The total allocation request for Senior Services is \$13,483.

Finally, staff recommends requesting \$80,500 to make ADA improvements at the Heritage Senior Center. Work will include remodeling all bathrooms and locker rooms, including installation of power-assist doors, in the building to meet ADA standards.

The 2026 CDBG application is recommended to be submitted as follows (the previous year’s allocation is provided below as a reference):

<b>2026 Program Activities</b>		<b>2025 Program Activities</b>	
Housing Rehab	\$9,540	Housing Rehab	\$71,707
Senior Transportation	\$35,000	Senior Transportation	\$35,000
Senior Services	\$13,483	Senior Services	\$15,194
ADA Compliance	\$80,500	Downtown Development Guide Update	\$3,000
		Industry Cluster Analysis Study	\$18,511
<b>TOTAL Allocation</b>	<b>\$138,523</b>	<b>TOTAL Allocation</b>	<b>\$143,412</b>



November 21, 2025

Ms. Tina Goodroad  
City of Lakeville  
20195 Holyoke Avenue  
Lakeville, MN 55044

**RE: CDBG Program Year 2026 Allocation Estimate**

Dear Ms. Goodroad,

Dakota County receives an annual allocation of Community Development Block Grant (CDBG) funds, which is a federal program administered by the Department of Housing and Urban Development (HUD). The program is designed to assist local governments with various community development projects and programs that primarily aid low- and moderate-income residents. Dakota County is considered an “Entitlement County”, and, as such, receives an annual allocation of federal CDBG funds. The Dakota County Board of Commissioners has chosen to allocate the CDBG funds amongst the various cities and townships in the County, as well use the funds for certain County programs. The Dakota County Community Development Agency (CDA) administers this program on behalf of Dakota County.

Each year, the city’s CDBG allocation is rebalanced to account for updated information in the American Community Survey provided by the Census Bureau for each city. Per HUD rules, the CDBG allocation is based on three factors: a community’s population, the number of people in poverty, and the number of overcrowded housing units. Each city receives a percentage of the annual Dakota County CDBG allocation based on the three factors. Because these factors change over time, the allocation each city receives will change over time.

The CDBG allocation Dakota County will receive for Program Year 2026 is not yet known and won’t be known until Congress passes and the President approves the Federal Fiscal Year 2026 federal budget. However, we believe it is prudent for each city to anticipate that the County will receive a similar amount to what was received for Program Year 2025, which was \$1,893,442.

The final Dakota County CDBG allocation affects the amount each city will receive for Program Year 2026. This amount may be more or less than what your city received for 2025. With that in mind, the estimated allocation for Lakeville for Program Year 2026 is **\$138,523**.

Please provide a contingency plan in your CDBG Program Year 2026 application that specifies which program(s) will receive more or less funding based on the final allocation. Please note that funding for any public service activities that the city may choose to fund with CDBG may be further reduced to ensure that the amount used for public services does not exceed 15 percent of the total Dakota County CDBG allocation.

If you have any questions, please feel free to contact me at (651) 675-4464 or [mdykes@dakotacda.org](mailto:mdykes@dakotacda.org).

Best Regards,  
DAKOTA COUNTY COMMUNITY DEVELOPMENT AGENCY

A handwritten signature in black ink that reads "Margaret M. Dykes". The signature is written in a cursive style with a large initial 'M'.

Margaret M. Dykes  
Asst. Director of Community and Economic Development

CC: Kati Bachmayer, Economic Development Manager



**Date:** 1/20/2026

## **Approval of Pay Equity Filing**

### **Proposed Action**

Staff recommends adoption of the following motion: Move to approve the submission of 2025 pay equity reporting.

### **Overview**

Every three years, government entities must submit a pay equity report to the State of Minnesota, as governed by MN State Stat. 471.991. Lakeville continues to use the job evaluation system established in 2018, with the help of an external compensation consultant. The job evaluation is necessary to determine the comparable work value of work performed by the various classes of employees within the organization.

The data being reported is based off of 2025 job and salary evaluation. All positions are reported on the Job Entry List attachment, which gives the entity a compliance report (also attached). There are three compliance test areas: statistical analysis test, salary range test and exceptional service pay test. In order to be in compliance, the underpayment ratio must be at or above 80%, Lakeville's is 105.45%. The salary range test needs to be 0% or at or above 80%, Lakeville's is 98.44%. The exceptional service pay test must be 0%, or at or above 80%, Lakeville is at 0%. In conclusion, Lakeville remains compliant in pay equity reporting and needs approval to officially file the results with the State of Minnesota.

### **Supporting Information**

1. Job Entry List
2. Predicted Pay
3. Compliance Test
4. Implementation Form

<p><b>Financial Impact:</b> \$    <b>Budgeted:</b> No    <b>Source:</b> <b>Envision Lakeville Community Values:</b> Good Value for Public Service <b>Report Completed by:</b> Alissa Frey, Human Resources Director</p>
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## Job Class Data Entry Verification List

Case: 2025 DATA

Lakeville

LGID: 630

Job Nbr	Class Title	Nbr Males	Nbr Females	Non-Binary	Class Type	Jobs Points	Min Mo Salary	Max Mo Salary	Yrs to Max Salary	Yrs of Service	Exceptional Service Pay
1	PT Sales Associate	29	20	0	B	65	2600.00	3336.00	4.00	0.00	
2	Seasonal Maint II	12	1	0	M	85	2816.00	3359.00	4.00	0.00	
3	PT Lead Sales Associate	3	5	0	B	90	2946.00	3683.00	4.00	0.00	
4	Park Maintenance I	1	0	0	M	115	4038.00	5223.00	7.00	0.00	
5	Utility Maintenance I	1	0	0	M	115	4038.00	5223.00	7.00	0.00	
6	FT Lead Sales Associate	1	3	0	F	120	4038.00	5223.00	7.00	0.00	
7	PT Facility Attendant	9	2	0	M	125	4038.00	5223.00	7.00	0.00	
8	Community Service Officer	3	5	0	B	148	4280.00	5539.00	7.00	0.00	
9	FT Lead Facility Attendant	1	0	0	M	153	4280.00	5539.00	7.00	0.00	
10	PT Recreation Program Speciali	0	1	0	F	155	4809.00	6223.00	7.00	0.00	
11	Accounts Payable Technician	0	2	0	F	193	5098.00	6596.00	7.00	0.00	
12	Police Records Technician	0	5	0	F	193	5098.00	6596.00	7.00	0.00	
13	Utility Billing Technician	0	2	0	F	195	5098.00	6596.00	7.00	0.00	
14	Administrative Assistant	0	10	0	F	198	5098.00	6596.00	7.00	0.00	
15	Asst Store Manager	4	3	0	B	201	5098.00	6596.00	7.00	0.00	
16	Forestry Technician	0	1	0	F	205	5098.00	6596.00	7.00	0.00	
17	Utility Maintenance II	12	0	0	M	210	5404.00	6992.00	7.00	0.00	
18	Park Maintenance II	10	0	0	M	213	5404.00	6992.00	7.00	0.00	
19	Street Maintenance II	13	0	0	M	213	5404.00	6992.00	7.00	0.00	
20	Evidence Technician	0	1	0	F	213	5404.00	6992.00	7.00	0.00	
21	Police Records Compliance Spec	0	1	0	F	218	5404.00	6992.00	7.00	0.00	
22	Police Administrative Speciali	0	1	0	F	220	5404.00	6992.00	7.00	0.00	
23	Engineering Services Represent	0	1	0	F	220	5404.00	6992.00	7.00	0.00	
24	Sr Administrative Asst	0	4	0	F	225	5404.00	6992.00	7.00	0.00	
25	Service Technician	3	0	0	M	228	5404.00	6992.00	7.00	0.00	
26	Assistant to Park Lead	1	0	0	M	231	5728.00	7412.00	7.00	0.00	
27	Code Enforcement Officer	0	1	0	F	235	5728.00	7412.00	7.00	0.00	
28	Assistant to Street Lead	1	0	0	M	238	5728.00	7412.00	7.00	0.00	
29	Assistant to Utility Lead	1	0	0	M	239	5728.00	7412.00	7.00	0.00	
30	Payroll Specialist	0	2	0	F	240	5728.00	7412.00	7.00	0.00	
31	Assistant to Lead Service Tech	1	0	0	M	243	5728.00	7412.00	7.00	0.00	
32	Environmental Resources Tech	1	0	0	M	245	5728.00	7412.00	7.00	0.00	

## Job Class Data Entry Verification List

Case: 2025 DATA

Lakeville

LGID: 630

Job Nbr	Class Title	Nbr Males	Nbr Females	Non-Binary	Class Type	Jobs Points	Min Mo Salary	Max Mo Salary	Yrs to Max Salary	Yrs of Service	Exceptional Service Pay
33	Lead Park Maintenance	1	0	0	M	255	6072.00	7856.00	7.00	0.00	
34	GIS Analyst	0	2	0	F	255	6072.00	7856.00	7.00	0.00	
35	Construction Representative	2	0	0	M	255	6072.00	7856.00	7.00	0.00	
36	Lead Utility Maintenance	1	0	0	M	256	6072.00	7856.00	7.00	0.00	
37	Lead Service Technician	1	0	0	M	263	6072.00	7856.00	7.00	0.00	
38	Lead Street Maintenance	1	0	0	M	263	6072.00	7856.00	7.00	0.00	
39	Communications Specialist	0	1	0	F	265	6072.00	7856.00	7.00	0.00	
40	Firefighter	17	1	0	M	270	6072.00	7856.00	7.00	0.00	
41	Video Production & Tech Specia	2	0	0	M	270	6072.00	7856.00	7.00	0.00	
42	Graduate Engineer	0	1	0	F	270	6072.00	7856.00	7.00	0.00	
43	Environmental Resources Sp	0	1	0	F	280	6436.00	8328.00	7.00	0.00	
44	Marketing Specialist & Events	0	1	0	F	280	6436.00	8328.00	7.00	0.00	
45	Information Technology Tech	2	0	0	M	281	6436.00	8328.00	7.00	0.00	
46	Event & E-Commerce Manager	1	0	0	M	283	6436.00	8328.00	7.00	0.00	
47	Assistant to the City Administ	1	0	0	M	290	6436.00	8328.00	7.00	0.00	
48	Human Resources Specialist	0	2	0	F	291	6436.00	8328.00	7.00	0.00	
49	Building Inspector	3	1	0	B	298	6822.00	8828.00	7.00	0.00	
50	Fire Inspector	2	0	0	M	310	6822.00	8828.00	7.00	0.00	
51	Crime Analyst	0	1	0	F	315	6822.00	8828.00	7.00	0.00	
52	Environmental Resources Specia	0	1	0	F	315	6822.00	8828.00	7.00	0.00	
53	Financial Analyst	0	1	0	F	316	6822.00	8828.00	7.00	0.00	
54	Police Officer	40	14	0	B	318	6822.00	8828.00	7.00	0.00	Longevity
55	Sr Construction Representative	1	0	0	M	318	6822.00	8828.00	7.00	0.00	
56	Recreation Program Coordinat	0	3	0	F	318	6822.00	8828.00	7.00	0.00	
57	Civil Engineer	0	1	0	F	318	6822.00	8828.00	7.00	0.00	
58	Store Manager	2	2	0	B	330	7232.00	9357.00	7.00	0.00	
59	Senior Building Inspector	3	0	0	M	333	7232.00	9357.00	7.00	0.00	
60	Fleet Supervisor	1	0	0	M	340	7232.00	9357.00	7.00	0.00	
61	Facility Supervisor	1	0	0	M	340	7232.00	9357.00	7.00	0.00	
62	Senior Financial Anaylst	1	2	0	B	353	7665.00	9919.00	7.00	0.00	
63	Recreation Manager	0	1	0	F	365	7665.00	9919.00	7.00	0.00	
64	Senior Planner	0	1	0	F	365	7665.00	9919.00	7.00	0.00	

## Job Class Data Entry Verification List

Case: 2025 DATA

Lakeville

LGID: 630

Job Nbr	Class Title	Nbr Males	Nbr Females	Non-Binary	Class Type	Jobs Points	Min Mo Salary	Max Mo Salary	Yrs to Max Salary	Yrs of Service	Exceptional Service Pay
65	Fire Captain	3	0	0	M	370	7665.00	9919.00	7.00	0.00	
66	Arts Center Manager	0	1	0	F	370	7665.00	9919.00	7.00	0.00	
67	GIS Manager	1	0	0	M	370	7665.00	9919.00	7.00	0.00	
68	City Forester	1	0	0	M	370	7665.00	9919.00	7.00	0.00	
69	Parks Supervisor	1	0	0	M	373	7665.00	9919.00	7.00	0.00	
70	Utilities Supervisor	1	0	0	M	373	7665.00	9919.00	7.00	0.00	
71	Streets Supervisor	1	0	0	M	373	7665.00	9919.00	7.00	0.00	
72	IT Systems Architect	1	0	0	M	380	8126.00	10513.00	7.00	0.00	
73	City Clerk	0	1	0	F	385	8126.00	10513.00	7.00	0.00	
74	Environmental Res Manager	1	0	0	M	398	8126.00	10513.00	7.00	0.00	
75	Fire Marshal	1	0	0	M	410	8612.00	11145.00	7.00	0.00	
76	Communications Manager	0	1	0	F	430	8612.00	11145.00	7.00	0.00	
77	Sergeant	6	3	0	B	440	10196.00	11813.00	4.00	0.00	
78	Streets & Fleet Superintendent	1	0	0	M	443	9130.00	11813.00	7.00	0.00	
79	Parks Superintendent	1	0	0	M	460	9130.00	11813.00	7.00	0.00	
80	Economic Development Manager	0	1	0	F	465	9130.00	11813.00	7.00	0.00	
81	Liquor Operations Director	0	1	0	F	478	9677.00	12522.00	7.00	0.00	
82	Public Works Coordinator	1	0	0	M	480	9677.00	12522.00	7.00	0.00	
83	Assistant City Engineer	1	0	0	M	480	9677.00	12522.00	7.00	0.00	
84	Assistant Finance Director	0	1	0	F	485	9677.00	12522.00	7.00	0.00	
85	Utilities Superintendent	1	0	0	M	488	9677.00	12522.00	7.00	0.00	
86	Building Official	1	0	0	M	500	9677.00	12522.00	7.00	0.00	
87	Planning Manager	0	1	0	F	505	10258.00	13273.00	7.00	0.00	
88	Business Manager	0	1	0	F	520	10258.00	13273.00	7.00	0.00	
89	Assistant Fire Chief	1	0	0	M	525	10258.00	13273.00	7.00	0.00	
90	Lieutenant	5	0	0	M	530	11456.00	13273.00	4.00	0.00	
91	City Engineer	1	0	0	M	555	10873.00	14069.00	7.00	0.00	

## Job Class Data Entry Verification List

Case: 2025 DATA

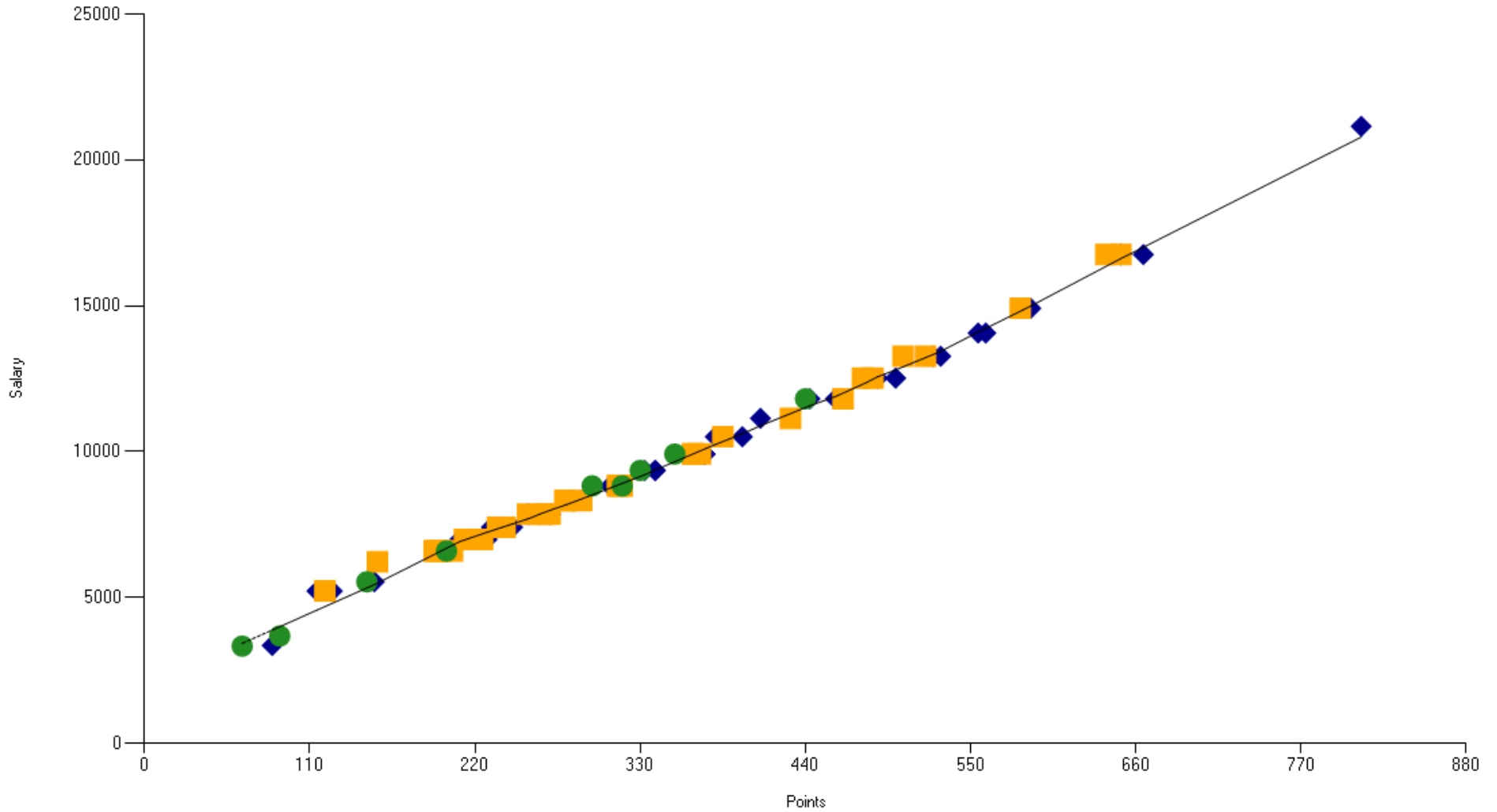
Lakeville

LGID: 630

Job Nbr	Class Title	Nbr Males	Nbr Females	Non-Binary	Class Type	Jobs Points	Min Mo Salary	Max Mo Salary	Yrs to Max Salary	Yrs of Service	Exceptional Service Pay
92	Info Technology Manager	1	0	0	M	560	10873.00	14069.00	7.00	0.00	
93	Human Resources Director	0	1	0	F	583	11256.00	14914.00	7.00	0.00	
94	Parks & Recreation Director	1	0	0	M	585	11256.00	14914.00	7.00	0.00	
95	Police Commanders	2	0	0	M	590	11256.00	14914.00	7.00	0.00	
96	Finance Director	0	1	0	F	640	12950.00	16757.00	7.00	0.00	
97	Comm & Ec Dev Director	0	1	0	F	650	12950.00	16757.00	7.00	0.00	
98	Fire Chief	1	0	0	M	650	12950.00	16757.00	7.00	0.00	
99	Public Works Director	1	0	0	M	650	12950.00	16757.00	7.00	0.00	
100	Police Chief	1	0	0	M	650	12950.00	16757.00	7.00	0.00	
101	Assistant City Administrator	1	0	0	M	665	12950.00	16757.00	7.00	0.00	
102	City Administrator	1	0	0	M	810	16350.00	21155.00	7.00	0.00	

**Job Number Count: 102**

## Predicted Pay Report for: Lakeville Case: 2025 DATA



◆ Male Jobs   
 ■ Female Jobs   
 ● Balanced Jobs   
 — Predicted Pay   
 - - - Line Continuation (Min)   
 - - - Line Continuation (Max)

## Predicted Pay Report for: Lakeville

### Case: 2025 DATA

Job Nbr	Job Title	Nbr Males	Nbr Females	Non-Binary	Total Nbr	Job Type	Job Points	Max Mo Salary	Predicted Pay	Pay Difference
1	PT Sales Associate	29	20	0	49	Balanced	65	3336.0000	3429.1155	-93.1155
2	Seasonal Maint II	12	1	0	13	Male	85	3359.0000	3886.4470	-527.4470
3	PT Lead Sales Associate	3	5	0	8	Balanced	90	3683.0000	4001.6331	-318.6331
4	Park Maintenance I	1	0	0	1	Male	115	5223.0000	4574.1508	648.8492
5	Utility Maintenance I	1	0	0	1	Male	115	5223.0000	4574.1508	648.8492
6	FT Lead Sales Associate	1	3	0	4	Female	120	5223.0000	4688.4837	534.5163
7	PT Facility Attendant	9	2	0	11	Male	125	5223.0000	4802.8165	420.1835
8	Community Service Officer	3	5	0	8	Balanced	148	5539.0000	5330.1130	208.8870
9	FT Lead Facility Attendant	1	0	0	1	Male	153	5539.0000	5444.4459	94.5541
10	PT Recreation Program Speciali	0	1	0	1	Female	155	6223.0000	5490.5203	732.4797
11	Accounts Payable Technician	0	2	0	2	Female	193	6596.0000	6574.7716	21.2284
12	Police Records Technician	0	5	0	5	Female	193	6596.0000	6574.7716	21.2284
13	Utility Billing Technician	0	2	0	2	Female	195	6596.0000	6613.6387	-17.6387
14	Administrative Assistant	0	10	0	10	Female	198	6596.0000	6645.5845	-49.5845
15	Asst Store Manager	4	3	0	7	Balanced	201	6596.0000	6781.3614	-185.3614
16	Forestry Technician	0	1	0	1	Female	205	6596.0000	6846.1724	-250.1724
17	Utility Maintenance II	12	0	0	12	Male	210	6992.0000	6922.9679	69.0321
20	Evidence Technician	0	1	0	1	Female	213	6992.0000	6973.6454	18.3546
18	Park Maintenance II	10	0	0	10	Male	213	6992.0000	6973.6454	18.3546
19	Street Maintenance II	13	0	0	13	Male	213	6992.0000	6973.6454	18.3546
21	Police Records Compliance Spec	0	1	0	1	Female	218	6992.0000	7057.3282	-65.3282
22	Police Administrative Speciali	0	1	0	1	Female	220	6992.0000	7091.2173	-99.2173
23	Engineering Services Represent	0	1	0	1	Female	220	6992.0000	7091.2173	-99.2173
24	Sr Administrative Asst	0	4	0	4	Female	225	6992.0000	7175.3125	-183.3125
25	Service Technician	3	0	0	3	Male	228	6992.0000	7237.8725	-245.8725
26	Assistant to Park Lead	1	0	0	1	Male	231	7412.0000	7286.7500	125.2500
27	Code Enforcement Officer	0	1	0	1	Female	235	7412.0000	7351.3167	60.6833
28	Assistant to Street Lead	1	0	0	1	Male	238	7412.0000	7406.0433	5.9567
29	Assistant to Utility Lead	1	0	0	1	Male	239	7412.0000	7422.8966	-10.8966
30	Payroll Specialist	0	2	0	2	Female	240	7412.0000	7439.1258	-27.1258
31	Assistant to Lead Service Tech	1	0	0	1	Male	243	7412.0000	7489.6859	-77.6859
32	Environmental Resources Tech	1	0	0	1	Male	245	7412.0000	7524.8175	-112.8175

## Predicted Pay Report for: Lakeville

### Case: 2025 DATA

Job Nbr	Job Title	Nbr Males	Nbr Females	Non-Binary	Total Nbr	Job Type	Job Points	Max Mo Salary	Predicted Pay	Pay Difference
34	GIS Analyst	0	2	0	2	Female	255	7856.0000	7692.9800	163.0200
33	Lead Park Maintenance	1	0	0	1	Male	255	7856.0000	7692.9800	163.0200
35	Construction Representative	2	0	0	2	Male	255	7856.0000	7692.9800	163.0200
36	Lead Utility Maintenance	1	0	0	1	Male	256	7856.0000	7709.9218	146.0782
37	Lead Service Technician	1	0	0	1	Male	263	7856.0000	7859.0496	-3.0496
38	Lead Street Maintenance	1	0	0	1	Male	263	7856.0000	7859.0496	-3.0496
39	Communications Specialist	0	1	0	1	Female	265	7856.0000	7894.8795	-38.8795
42	Graduate Engineer	0	1	0	1	Female	270	7856.0000	7991.6961	-135.6961
40	Firefighter	17	1	0	18	Male	270	7856.0000	7991.6961	-135.6961
41	Video Production & Tech Specia	2	0	0	2	Male	270	7856.0000	7991.6961	-135.6961
43	Environmental Resources Sp	0	1	0	1	Female	280	8328.0000	8171.5842	156.4158
44	Marketing Specialist & Events	0	1	0	1	Female	280	8328.0000	8171.5842	156.4158
45	Information Technology Tech	2	0	0	2	Male	281	8328.0000	8189.7073	138.2927
46	Event & E-Commerce Manager	1	0	0	1	Male	283	8328.0000	8225.9534	102.0466
47	Assistant to the City Administ	1	0	0	1	Male	290	8328.0000	8360.1334	-32.1334
48	Human Resources Specialist	0	2	0	2	Female	291	8328.0000	8380.8651	-52.8651
49	Building Inspector	3	1	0	4	Balanced	298	8828.0000	8509.1150	318.8850
50	Fire Inspector	2	0	0	2	Male	310	8828.0000	8753.2410	74.7590
51	Crime Analyst	0	1	0	1	Female	315	8828.0000	8852.1078	-24.1078
52	Environmental Resources Specia	0	1	0	1	Female	315	8828.0000	8852.1078	-24.1078
53	Financial Analyst	0	1	0	1	Female	316	8828.0000	8872.4963	-44.4963
54	Police Officer	40	14	0	54	Balanced	318	8828.0000	8912.3609	-84.3609
56	Recreation Program Coodinator	0	3	0	3	Female	318	8828.0000	8912.3609	-84.3609
57	Civil Engineer	0	1	0	1	Female	318	8828.0000	8912.3609	-84.3609
55	Sr Construction Representative	1	0	0	1	Male	318	8828.0000	8912.3609	-84.3609
58	Store Manager	2	2	0	4	Balanced	330	9357.0000	9150.4029	206.5971
59	Senior Building Inspector	3	0	0	3	Male	333	9357.0000	9210.3601	146.6399
60	Fleet Supervisor	1	0	0	1	Male	340	9357.0000	9373.3950	-16.3950
61	Facility Supervisor	1	0	0	1	Male	340	9357.0000	9373.3950	-16.3950
62	Senior Financial Anaylst	1	2	0	3	Balanced	353	9919.0000	9663.6296	255.3704
63	Recreation Manager	0	1	0	1	Female	365	9919.0000	9900.1733	18.8267
64	Senior Planner	0	1	0	1	Female	365	9919.0000	9900.1733	18.8267

## Predicted Pay Report for: Lakeville

### Case: 2025 DATA

Job Nbr	Job Title	Nbr Males	Nbr Females	Non-Binary	Total Nbr	Job Type	Job Points	Max Mo Salary	Predicted Pay	Pay Difference
66	Arts Center Manager	0	1	0	1	Female	370	9919.0000	10028.7965	-109.7965
65	Fire Captain	3	0	0	3	Male	370	9919.0000	10028.7965	-109.7965
67	GIS Manager	1	0	0	1	Male	370	9919.0000	10028.7965	-109.7965
68	City Forester	1	0	0	1	Male	370	9919.0000	10028.7965	-109.7965
69	Parks Supervisor	1	0	0	1	Male	373	9919.0000	10094.3448	-175.3448
70	Utilities Supervisor	1	0	0	1	Male	373	9919.0000	10094.3448	-175.3448
71	Streets Supervisor	1	0	0	1	Male	373	9919.0000	10094.3448	-175.3448
72	IT Systems Architect	1	0	0	1	Male	380	10513.0000	10246.4816	266.5184
73	City Clerk	0	1	0	1	Female	385	10513.0000	10356.7224	156.2776
74	Environmental Res Manager	1	0	0	1	Male	398	10513.0000	10614.2912	-101.2912
75	Fire Marshal	1	0	0	1	Male	410	11145.0000	10889.9109	255.0891
76	Communications Manager	0	1	0	1	Female	430	11145.0000	11288.3651	-143.3651
77	Sergeant	6	3	0	9	Balanced	440	11813.0000	11509.4974	303.5026
78	Streets & Fleet Superintendent	1	0	0	1	Male	443	11813.0000	11575.2617	237.7383
79	Parks Superintendent	1	0	0	1	Male	460	11813.0000	11892.6956	-79.6956
80	Economic Development Manager	0	1	0	1	Female	465	11813.0000	11998.7814	-185.7814
81	Liquor Operations Director	0	1	0	1	Female	478	12522.0000	12295.9998	226.0002
82	Public Works Coordinator	1	0	0	1	Male	480	12522.0000	12356.8143	165.1857
83	Assistant City Engineer	1	0	0	1	Male	480	12522.0000	12356.8143	165.1857
84	Assistant Finance Director	0	1	0	1	Female	485	12522.0000	12506.1109	15.8891
85	Utilities Superintendent	1	0	0	1	Male	488	12522.0000	12568.7907	-46.7907
86	Building Official	1	0	0	1	Male	500	12522.0000	12804.1412	-282.1412
87	Planning Manager	0	1	0	1	Female	505	13273.0000	12912.4069	360.5931
88	Business Manager	0	1	0	1	Female	520	13273.0000	13239.4569	33.5431
89	Assistant Fire Chief	1	0	0	1	Male	525	13273.0000	13332.1881	-59.1881
90	Lieutenant	5	0	0	5	Male	530	13273.0000	13443.6227	-170.6227
91	City Engineer	1	0	0	1	Male	555	14069.0000	14100.7457	-31.7457
92	Info Technology Manager	1	0	0	1	Male	560	14069.0000	14228.6455	-159.6455
93	Human Resources Director	0	1	0	1	Female	583	14914.0000	14816.1869	97.8131
94	Parks & Recreation Director	1	0	0	1	Male	585	14914.0000	14867.2124	46.7876
95	Police Commanders	2	0	0	2	Male	590	14914.0000	14996.2204	-82.2204
96	Finance Director	0	1	0	1	Female	640	16757.0000	16361.1828	395.8172

## Predicted Pay Report for: Lakeville

Case: 2025 DATA

Job Nbr	Job Title	Nbr Males	Nbr Females	Non-Binary	Total Nbr	Job Type	Job Points	Max Mo Salary	Predicted Pay	Pay Difference
97	Comm & Ec Dev Director	0	1	0	1	Female	650	16757.0000	16621.0277	135.9723
98	Fire Chief	1	0	0	1	Male	650	16757.0000	16621.0277	135.9723
99	Public Works Director	1	0	0	1	Male	650	16757.0000	16621.0277	135.9723
100	Police Chief	1	0	0	1	Male	650	16757.0000	16621.0277	135.9723
101	Assistant City Administrator	1	0	0	1	Male	665	16757.0000	17011.7645	-254.7645
102	City Administrator	1	0	0	1	Male	810	21155.0000	20786.3018	368.6982

**Job Number Count: 102**

# Compliance Report

Jurisdiction: Lakeville  
20195 Holyoke Avenue

Report Year: 2026  
Case: 1 - 2025 DATA (Private (Jur Only))

Lakeville, MN 55044

Contact: Alissa Frey

Phone: (952) 985-4491

E-Mail: afrey@lakevillemn.gov

The statistical analysis, salary range and exceptional service pay test results are shown below. Part I is general information from your pay equity report data. Parts II, III and IV give you the test results.

For more detail on each test, refer to the Guide to Pay Equity Compliance and Computer Reports.

## I. GENERAL JOB CLASS INFORMATION

	Male Classes	Female Classes	Balanced Classes	All Job Classes
# Job Classes	55	38	9	102
# Employees	141	64	146	351
Avg. Max Monthly Pay per employee	8203.09	8234.14		7557.15

## II. STATISTICAL ANALYSIS TEST

### A. Underpayment Ratio = 105.4545 \*

	Male Classes	Female Classes
a. # At or above Predicted Pay	26	19
b. # Below Predicted Pay	29	19
c. TOTAL	55	38
d. % Below Predicted Pay (b divided by c = d)	52.73	50.00

\*(Result is % of male classes below predicted pay divided by % of female classes below predicted pay.)

### B. T-test Results

Degrees of Freedom (DF) = 203	Value of T = -1.590
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a. Avg. diff. in pay from predicted pay for male jobs = -20

b. Avg. diff. in pay from predicted pay for female jobs = 35

## III. SALARY RANGE TEST = 98.44 (Result is A divided by B)

A. Avg. # of years to max salary for male jobs = 6.89

B. Avg. # of years to max salary for female jobs = 7.00

## IV. EXCEPTIONAL SERVICE PAY TEST = 0.00 (Result is B divided by A)

A. % of male classes receiving ESP = 0.00 \*

B. % of female classes receiving ESP = 0.00

\*(If 20% or less, test result will be 0.00)

# Pay Equity Implementation Report

## Part A: Jurisdiction Identification

Jurisdiction: Lakeville  
 20195 Holyoke Avenue  
  
 Lakeville, MN 55044

Jurisdiction Type: City

Contact: Alissa Frey

Phone: (952) 985-4491

E-Mail: afrey@lakevillemn.gov

## Part B: Official Verification

1. The job evaluation system used measured skill, effort responsibility and working conditions and the same system was used for all classes of employees.

The system was used: Consultant

Description:

The same as last year

2. Health Insurance benefits for male and female classes of comparable value have been evaluated and:  
 There is no difference and female classes are not at a disadvantage.

3. An official notice has been posted at:

Lakeville City Hall  
 (prominent location)

informing employees that the Pay Equity Implementation Report has been filed and is available to employees upon request. A copy of the notice has been sent to each exclusive representative, if any, and also to the public library.

The report was approved by:

(governing body)

(chief elected official)

(title)

## Part C: Total Payroll

\$29446813.00

is the annual payroll for the calendar year just ended December 31.

- Checking this box indicates the following:
- signature of chief elected official
  - approval by governing body
  - all information is complete and accurate, and
  - all employees over which the jurisdiction has final budgetary authority are included
- Date Submitted:1/14/2026