City of Lake Geneva, 626 Geneva St, Lake Geneva, WI 53147- 262.248.3673- www.cityoflakegeneva.gov

COMMON COUNCIL AGENDA
MONDAY, OCTOBER 13, 2025 - 6:01 PM
LAKE GENEVA CITY HALL; COUNCIL CHAMBERS (MAIN LEVEL)
THIS MEETING WILL START FOLLOWING THE ADJOURNMENT OF THE JOINT PLAN COMMISSION & COMMON COUNCIL MEETING

Members:
Mayor Todd Krause, Council President Mary Jo Fesenmaier, Council Vice President Cindy Yager, Alderpersons: Sherri Ames, Linda Frame, Joel Hoiland, JaNelle Powers, Brian Smith and Cathy Stoodley

1. Call to Order
2. Pledge of Allegiance
3. Roll Call
4. Awards, Presentations, Proclamations, and Announcements
5. Re-consider business from previous meeting
6. Comments from the public as allowed by Wis. Stats. §19.84(2), limited to items on this agenda, except for public hearing items. Comments will be limited to 5 minutes
7. Acknowledgement of Correspondence
8. City Administrator's Report
9. CONSENT AGENDA– Any item listed on the consent agenda may be removed at the request of any member of the Council. The request requires no second, is not discussed, and is not voted upon.
    a. Regular Council Minutes from September 22, 2025
    b. Declaring DPW Items as Surplus
    c. Original Class "B" Beer / "Class C" Wine License application filed by Area 262 LLC dba Area 262, 100 N Edwards Blvd, Lake Geneva, WI 53147, Tristan Christ, Agent
    d. Original Class "B" Beer / "Class C" Wine License application filed by Liang's LLC dba Su Wings Chinese Restaurant, 743 North St, Lake Geneva, WI 53147, Dongling Yang, Agent
    e. Complimentary Riviera Ballroom Event Request Form for the Veterans Day Program on November 11, 2025, from 4:00 to 5:00 pm; Lake Geneva Public Library
    f. Complimentary Riviera Ballroom Event Request Form for A Lake Geneva Holiday Concert on December 21, 2025, at 12:00 pm, Allan Dennis, Midwest Young Artists

g. Pay Request No. 2 from CK Contractors, LLC for the Lagoon Seawall Replacement Project in the amount of $3,275.71

h. Pay Application No. 2 to Cichinni Asphalt for the 2025 Basketball and Tennis Courts Resurfacing project for $75,866.00

i. Pay Application No. 3 to Wolf Paving for the 2025 Street Program for $48,920.27

10. Items removed from the Consent Agenda

11. Ordinances *(first and possible second reading)*

a. Ordinance 25-15 An ordinance amending sub-section (3) Personnel Committee of Section 2-49, Personnel Committee, of Article II, City Council, of Chapter 2, Administration of the City of Lake Geneva Municipal Code of the City of Lake Geneva, clarifying responsibilities of the City Administrator and the Personnel Committee

12. Discussion/Action on the recommendations of the Finance, Licensing, and Regulation Committee- Ald. Ames

a. Rejection of bid proposals for the Rapid Flashing Beacons at School Crossing project, and to start the Request for Proposals (RFP) process

b. Approval of a Service Provider/Professional Services Agreement for Strategic Planning Services with Future iQ, Inc. for an amount of $45,000

c. Approval of the Pre-Paid Checks of $86,133.94 and Regular Checks of $240,032.17

13. Discussion/Action regarding the Harbormaster Job Description - Ald. Hoiland *(Personnel Committee recommended approval October 6, 2025)*

14. Discussion/Action regarding temporary limited easements request from the WI Department of Transportation (DOT)

15. Adjournment

Requests from persons with disabilities, who need assistance to participate in this meeting or hearing, should be made to the City Clerk's office in advance so the appropriate accommodations can be made.

CITY OF LAKE GENEVA COMMON COUNCIL MINUTES
MONDAY, SEPTEMBER 22, 2025 - 6:00 PM
LAKE GENEVA CITY HALL; COUNCIL CHAMBERS (MAIN LEVEL)

Members: Mayor Todd Krause, Council President Mary Jo Fesenmaier, Council Vice President Cindy Yager, Alderpersons: Sherri Ames, Linda Frame, Joel Hoiland, JaNelle Powers, Brian Smith and Cathy Stoodley

Call to Order
by Mayor Krause at 6:00 pm.

Pledge of Allegiance
by Administrator De Angelis.

Roll Call
Present: Todd Krause, Sherri Ames, JaNelle Powers (via zoom), Mary Jo Fesenmaier, Linda Frame, Joel Hoiland (via zoom), Brian Smith, Cynthia Yager and Cathy Stoodley. Others present: City Administrator Dave De Angelis, City Clerk Lacey L. Reynolds, City Attorney Dan Draper, Finance Director Laura Pisarcik and other interested persons.

Awards, Presentations, Proclamations, and Announcements
Saturday, September 27th is the 130th Anniversary celebration of the Lake Geneva Public Library.

Re-consider business from previous meeting
None.

Comments from the public as allowed by Wis. Stats. §19.84(2), limited to items on this agenda, except for public hearing items. Comments will be limited to 5 minutes
Bill Huntress spoke about item 11b, Peg Esposito spoke about 11b, 13 & 18b, Mike Coolidge spoke about item 15, Alex Binanti spoke in favor of item 11b, Troy Dyer spoke about items 13 & 17, Gary Millette spoke about land appraisal and Spyro Condos spoke in favor of item 11b.

Acknowledgement of Correspondence
Clerk Reynolds announced correspondence was received about trick or treating and other correspondence was sent on to the appropriate recipient.

City Administrator's Report
Administrator De Angelis reported the City's phone system update is in process and will take about 2 months to complete.

Consent Agenda–Any item listed on the consent agenda may be removed at the request of any member of the Council. The request requires no second, is not discussed, and is not voted upon.
Motion by Ames to approve all items, second by Yager. Voice vote, approved, motion carried.

Approve the Regular Council Minutes of September 8, 2025

Temporary "Class B" Wine License application filed by Geneva Lake Arts Foundation, Inc for an Open House on November 7, 2025, located at 223 Broad St, David McConnell, Agent

Temporary Class "B" Beer License Application filed by Downtown Lake Geneva Inc. for Oktoberfest on October 11 & 12, 2025, located at Flat Iron Park, Alexandria Binanti, Agent

Amendment to Public Event Permit for Oktoberfest 2025 allowing for Street Closure of Wrigley Dr and switching of the locations of the children's area and the beer tent

Public Event Permit Application for Dragon Days ™ Fantasy Festival from October 3 to 5, 2025 with updated map

Firework Permit application filed by the Badger High School Student Council for October 3, 2025 at approximately 9 PM

Items removed from the Consent Agenda
None.

Ordinances & Resolutions

Resolution 25-R50: A resolution to Establish an Annual Trick-or-Treat Day and Time in the City of Lake Geneva
Motion by Ames to approve, second by Fesenmaier. Administrator De Angelis reviewed the resolution and discussion took place. Roll call vote: Ames, yes; Fesenmaier, yes; Powers, yes; Frame, no; Smith, no; Hoiland, yes; Stoodley, no; Yager, yes. Motion carried 5-3.

Resolution 25-R51: A resolution designating city property located on Sheridan Springs Rd tax key parcels ZA467900001, ZA467900002, ZA468000001 & ZA468000002 as surplus property
Motion by Smith to approve, second by Frame. Discussion took place and an amendment was made. Motion by Fesenmaier to amend and remove ZA467900001, second by Ames. Roll call vote: Fesenmaier, yes; Ames, yes; Powers, no; Frame, no; Smith, no; Hoiland, no; Stoodley, no; Yager, no. Motion failed 2-6. Alder Yager made a motion to amend and retain an easement on ZA467900001 to allow access to Hillmoor determined through the negotiation process and approved by council, second by Alder Smith. Discussion took place and the amendment was withdrawn. Discussion continued. Alder Yager clarified she wanted it noted during negotiations that it should include an easement with parking and access to Hillmoor. Discussion continued. Motion by Stoodley to call the question, second by Hoiland. Voice vote, approved, motion carried. Main motion vote - Roll call vote: Smith, yes; Frame, yes; Fesenmaier, no; Powers, no; Ames, yes; Yager, no; Stoodley, yes; Hoiland, yes. Motion carried 5-3.

Discussion/Action on the recommendations of the Finance, Licensing, and Regulation Committee- Ald. Ames

Approval of Pay Application No. 6 to Wolf Paving for the 2024 Street Program for $17,924.82
Motion by Ames to approve, second by Fesenmaier. Voice vote, approved, motion carried.

Approval of Pre-Paid Checks of $207,167.00 and Regular Checks of$312,888.92
Motion by Ames to approve, second by Smith. Voice vote, approved, motion carried.

Discussion/Action regarding Friends of Hillmoor HWY 50 entrance improvements
Motion by Fesenmaier to suspend the rules for Peg Esposito to speak, second by Ames. Voice vote, approved, motion carried. Esposito explained the new layout for the plantings and discussion took place. Motion by Fesenmaier to approve conditional of Administrator De Angelis review of the landscape plan, second by Ames. Voice vote, approved, motion carried.

Discussion/Action regarding adding a crosswalk on Center Street adjacent to Brunk Pavilion
Motion by Stoodley to approve, second by Frame. Voice vote, approved, motion carried.

Discussion/Action regarding approval of honorary 'Pioneers of Baseball' signs by the YMCA at Vet's Park pending the design matching the city colors *(Park Board recommendation)*
Attorney Draper advised this item should go to Plan Commission for review. Motion by Fesenmaier to refer this item to the Plan Commission, second by Yager. Voice vote, approved, motion carried.

Review and possible approval of Spectrum proposal for upgrade of services for public access channel 25
Administrator De Angelis explained the contract, cost and timeline. Motion by Frame to approve, second by Smith. Voice vote, 7-approved, 1-no (Stoodley), motion carried.

Review and possible approval of proposal for the creation of a Strategic Plan for the City of Lake Geneva
Administrator De Angelis reviewed the RFP process and each firm presented to the council. The council asked questions and discussed the proposals. Motion by Fesenmaier to approve Future iQ, second by Ames. Roll call vote: Fesenmaier, yes; Ames, yes; Powers, yes; Frame, no; Smith, yes; Hoiland, yes; Stoodley, no; Yager, no. Motion carried 5-3.

Mayoral Appointment

Dennis Lyon to the Utility Commission term expiring October 1, 2028
Motion by Fesenmaier to approve, second by Smith. Voice vote, approved, motion carried.

Betty Volquardsen to the Board of Park Commissioners term to expire May 1, 2026
Motion by Yager to approve, second by Fesenmaier. Voice vote, approved, motion carried.

Motion to go into Closed Session pursuant to 1) Wisconsin Statutes Sec. 19.85(1)(g) Conferring with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is involved with the Town of Bloomfield and the Village of Bloomfield; and pursuant to Wisconsin Statutes Sec.19.85(1)(e) for deliberating or negotiating or conducting other specified public business, whenever competitive or bargaining reasons require a closed session regarding a possible Intergovernmental Cooperation Agreement among the Town of Bloomfield, the Village of Bloomfield, and the City of Lake Geneva
Motion by Ames to adjourn to closed session to include the City Administrator, City Clerk, Finance Director and outside Counsel, second by Yager. Roll call vote: Ames, yes; Yager, yes; Powers, yes; Stoodley, yes; Fesenmaier, yes; Hoiland, yes; Frame, yes; Smith, yes. Motion carried. Adjourned to closed session at 7:53 pm.

Motion to return to open session pursuant to Wisconsin Statues 19.85 (2) and take action on any items discussed in closed session
Reconvened in open session at 8:43 pm. No action taken.

Adjournment
Motion by Fesenmaier to adjourn, second by Ames. Voice vote, approved, motion carried. Adjourned at 8:43 pm.

Lacey L. Reynolds
City Clerk

DPW Auction Items

- Pressure Washer
- Riviera Tables
- Misc Items from City Hall
- Misc Electronic Equipment
- Misc Traffic Signs

Alcohol License Approvals

Business: Area 262

License Type: B Beer / C Wine

Police-Background Checks Completed and Premises Reviewed

☑ Approved ☐ Denied Signature: Chief Edward Gritzner

Notes:

Fire-Premises Reviewed for Violations

☑ Approved ☐ Denied Signature: Dalkowski (Sep 10, 2025 10:26:07 CDT)

Notes:

Building & Zoning-Premises Reviewed for Violations

☑ Approved ☐ Denied Signature: Renee Hanlon Renee Hanlon (Sep 10, 2025 13:11:46 CDT)

Notes:

Signature:

City Clerk-Applicant is Qualified and Premises is Lawful

☒ Approved ☐ Denied Signature: Vanessa Wolkins

Notes:

waiting for DATCP Standards

CITY OF LAKE GENEVA
ALCOHOL LICENSE CHECKLIST

Business Name (LLC/INC/CO): Area 262 LLC

Trade (dba) Name: Area 262

Local Address: 100 N Edwards Blvd. Lake Geneva, WI

☒	**Discuss with City Clerk (or Assistant City Clerk) the desired alcohol license and proposed use**
☒	**Alcohol Beverage License Application (AB-200)**
☒	**Alcohol Beverage Individual Questionnaire (AB-100)** A copy must be submitted for each officer, director, member, manager, and agent of the corporation, LLC, or non-profit organization.
☒	**Alcohol Beverage Appointment of Agent (AB-101)**
☒	**$25 publication fee** payable to the City of Lake Geneva and due upon application
☒	**Proof of Completing Responsible Beverage Server Training Course.** Individuals, partners and agents of corporations and LLC's must have successfully completed an approved responsible beverage server training course within the past two years. *Does not apply to individuals who held or were an agent of a corporation or LLC that held a liquor license within the past two years.*
☒	**Proof of Residency.** Applicants must have resided 90 days continuously in this state prior to the date of application. Proof of residency could include voter registration, motor vehicle registration, driver's license, residential lease or purchase agreement, or income tax records. *Officers, directors, members or managers of corporations or LLCs are not required to meet the State residency requirement.*
☒	**Copy of Wisconsin Seller's Permit (all) & WI DATCP Restaurant Sanitation Standards Compliance ("Class B" Liquor & "Class C" Wine).**
☒	**Map of premises.** Applicant must submit a map of the premises, identifying the building(s), room(s), and/or land area under his/her control where alcohol beverages will be sold, served, consumed, or stored. Maps do not need to be drawn to scale but should be clear and legible.
☒	**General Business License & Other Applicable Municipal Licenses.** New businesses must also obtain occupancy through the Building & Zoning department.

Application forms may be obtained at City Hall or from the Wisconsin Department of Revenue website, https://www.revenue.wi.gov/Pages/Form/alcohol-Home.aspx

For Office Use Only

Date Filed with Clerk: 8/21/25 Publication & License Fee Receipt: 15.0154142 [Receipt Code: 15:1501]

Amount Paid: $125.00 Date forwarded to Police Chief: _____

Form **AB-200**

Alcohol Beverage License Application

For Municipal Use Only	
Municipality	Lake Geneva
License Period	

License(s) Requested: (up to two boxes may be checked)

- ☐ Class "A" Beer ..... $ _____
- ☑ Class "B" Beer ..... $ 100
- ☐ "Class A" Liquor ..... $ _____
- ☐ "Class B" Liquor ..... $ _____
- ☐ "Class A" Liquor (cider only) $ _____
- ☐ Reserve "Class B" Liquor $ _____
- ☑ "Class C" Liquor (wine only) $ 100

Fees	
License Fees	$
Background Check Fee	$
Publication Fee	$ 25 Pd 8/21
Total Fees	$

Part A: Premises/Business Information

1. Legal Business Name (individual name if sole proprietorship)
Area 262 LLC

2. Business Trade Name or DBA
Area 262

[redacted]

4. Wisconsin Seller's Permit Number
456-1032019676-03

5. Entity Type *(check one)*
☐ Sole Proprietor ☐ Partnership ☑ Limited Liability Company ☐ Corporation ☐ Nonprofit Organization

6. State of Organization	7. Date of Organization	8. Wisconsin DFI Registration Number
WI	01/15/2024	A110324

9. Premises Address
100 N Edwards Blvd

10. City	11. State	12. Zip Code
Lake Geneva	WI	53147

13. County	14. Governing Municipality: ☑ City ☐ Town ☐ Village of: Lake Geneva	15. Aldermanic District
Walworth		3

16. Premises Phone	17. Premises Email	18. Website
(262) 203-5101	area262lg@gmail.com	www.area262lg.com

19. Premises Description - Describe the building or buildings where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.
5,000 sq foot open first floor, 3,000 sq foot open 2nd floor, connected garage storage building, fenced in outdoor picnic area.

20. Mailing Address (if different from premises address)

21. City	22. State	23. Zip Code

Part B: Questions

1. Has the business (sole proprietorship, partnership, limited liability company, or corporation) been convicted of violating federal or state laws or local ordinances? Exclude traffic offenses unless related to alcohol beverages. ☐ Yes ☑ No

If yes, list the details of violation below. Attach additional sheets if necessary.

Law/Ordinance Violated	Location	Trial Date

Penalty Imposed	Was sentence completed? ..... ☐ Yes ☐ No

Law/Ordinance Violated	Location	Trial Date

Penalty Imposed	Was sentence completed? ..... ☐ Yes ☐ No

2. Are charges for any offenses pending against the business? Exclude traffic offenses unless related to alcohol beverages. ☐ Yes ☑ No

If yes, describe the nature and status of pending charges using the space below. Attach additional sheets as needed.

3. Is the applicant business or any of its officers, directors, members, agent, employees, owners, or other related individuals or entities a restricted investor with any interest in an alcohol beverage producer or distributor? ☐ Yes ☑ No
If yes, provide the name of the restricted investor and describe the nature of the interest.

4. Is the applicant business owned by another business entity? ☐ Yes ☑ No
If yes, provide the name(s) and FEIN(s) of the business entity owners below. Attach additional sheets as needed.

4a. Name of Business Entity	4b. Business Entity FEIN

5. Have the partners, agent, or sole proprietor satisfied the responsible beverage server training requirement for this license period? Submit proof of completion. ☑ Yes ☐ No

6. Is the applicant business indebted to any wholesaler beyond 15 days for beer or 30 days for liquor/wine? ☐ Yes ☑ No

7. Does the applicant business owe past due municipal property taxes, assessments, or other fees? ☐ Yes ☑ No

Part C: Individual Information

List the name, title, and phone number for each person or entity holding the following positions in the applicant business or businesses listed in Part B, Question 4: sole proprietor, all officers, directors, and agent of a corporation or nonprofit organization, all partners of a partnership, and all members, managers, and agent of a limited liability company. Attach additional sheets if necessary.

Include Form AB-100 for each person listed below. Corporations and LLCs must appoint an agent by including Form AB-101.

Last Name	First Name	Title	Phone
Christ	Tristan	Member	[redacted]
Roen	Austin	Member	

Part D: Attestation

One of the following must sign and attest to this application:

• sole proprietor • one general partner of a partnership • one corporate officer • one member of an LLC

READ CAREFULLY BEFORE SIGNING: Under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the license. Further, I agree that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another individual or entity. I agree to operate this business according to the law, including but not limited to, purchasing alcohol beverages from state authorized wholesalers. I understand that lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Christ	Tristan	S

Title: Member

[redacted]

Signature: [signature]

Date: 08/15/2025

Part E: For Clerk Use Only

Date Application Was Filed With Clerk	License Number	Date License Granted	Date License Issued
8/21/25			

Signature of Clerk/Deputy Clerk	Date Provisional License Issued (if applicable)

Form
AB-101

Alcohol Beverage Appointment of Agent

Date
08/15/2025

Agent Type *(check one)*

☑ Original (no fee) ☐ Successor ($10 fee for municipal licensees only)

Part A: Business Information

1. Legal Business Name (individual name if sole proprietor)
Area 262 LLC

2. Business Trade Name or DBA

3. Entity Type *(check one)*
☑ Limited Liability Company ☐ Corporation ☐ Nonprofit Organization

4. Alcohol Beverage Business Authorization *(check one)*
☑ Municipal Retail License ☐ State Permit

5. If successor agent, provide State Permit or Municipal Retail License Number

6. Describe the reason for appointing a successor agent, if successor is checked above.

Part B: Agent Information

1. Last Name	2. First Name	3. M.I.
Christ	Tristan	S

[redacted]

8. State
WI

[redacted]

Part C: Agent Questions

1. Have you satisfied the responsible beverage server training requirement? ☑ Yes ☐ No
Submit proof of completion.

2. Have you completed Form AB-100, *Alcohol Beverage Individual Questionnaire* (licensee) or Form AB-300, *Alcohol Beverage Personal Questionnaire* (permittee)? ☑ Yes ☐ No

3. Have you been a Wisconsin resident for at least 90 continuous days? ☑ Yes ☐ No
See instructions for exceptions.

Continued →

Part D: Business Attestation

READ CAREFULLY BEFORE SIGNING: I, the **Undersigned**, authorize the above-named individual to act for the above-named corporation, nonprofit organization, or limited liability company with full authority and control of the premises and of all alcohol beverage activities on such premises. I certify that I am authorized by the above-named entity to authorize this individual to act on behalf of the entity. If I am appointing a successor agent, I rescind all previous agent appointments for this premises. Further, I understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Christ	Tristan	S

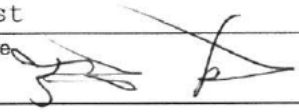
Title	[redacted]
Member	

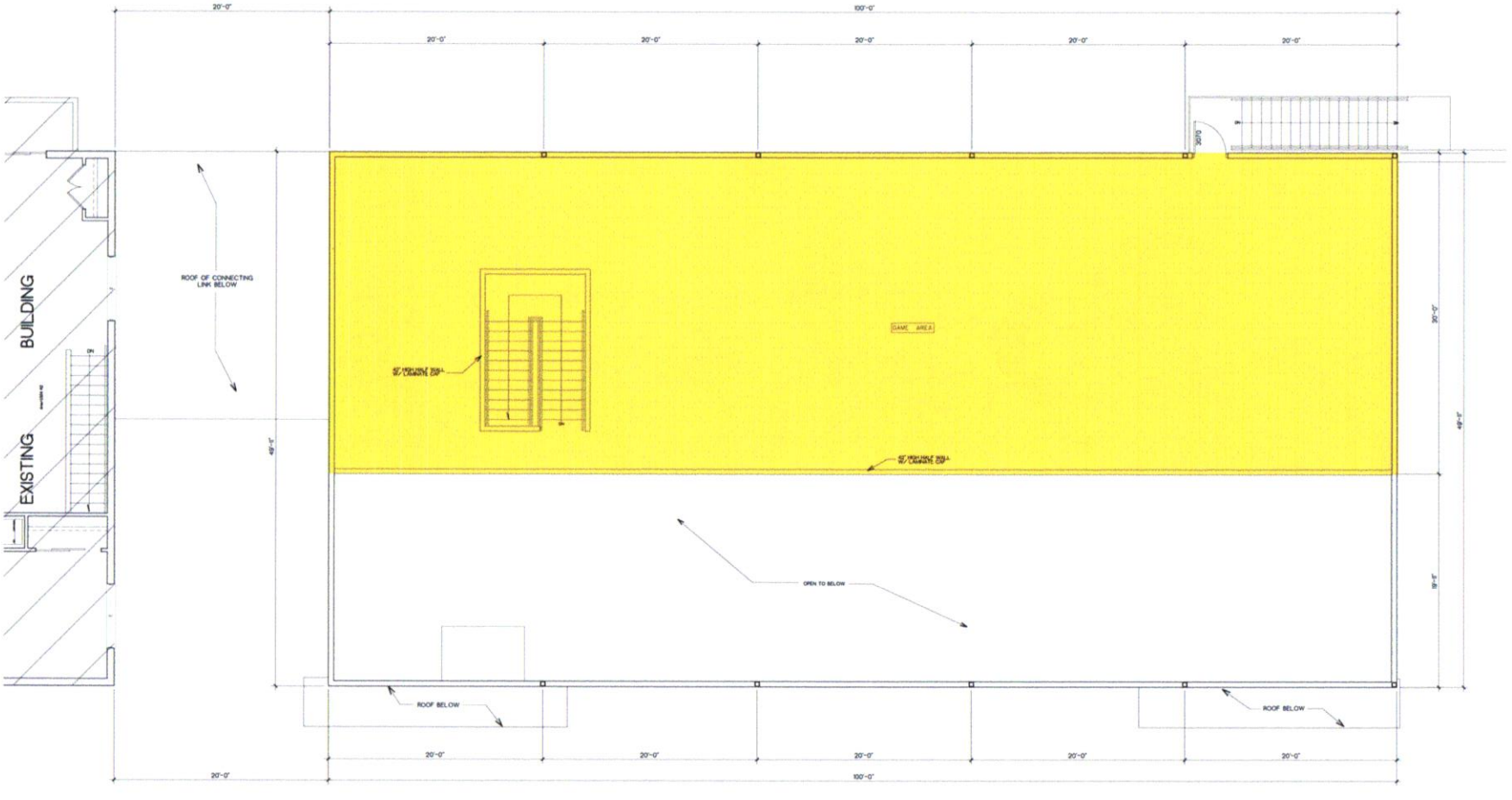
Signature	Date
	08/15/2025

Part E: Agent Attestation

READ CAREFULLY BEFORE SIGNING: I, the **Agent**, hereby accept this appointment as agent for the above-named corporation, nonprofit organization, or limited liability company and assume full responsibility for the conduct of all alcohol beverage activities on the premises for the above-named business. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Christ	Tristan	S

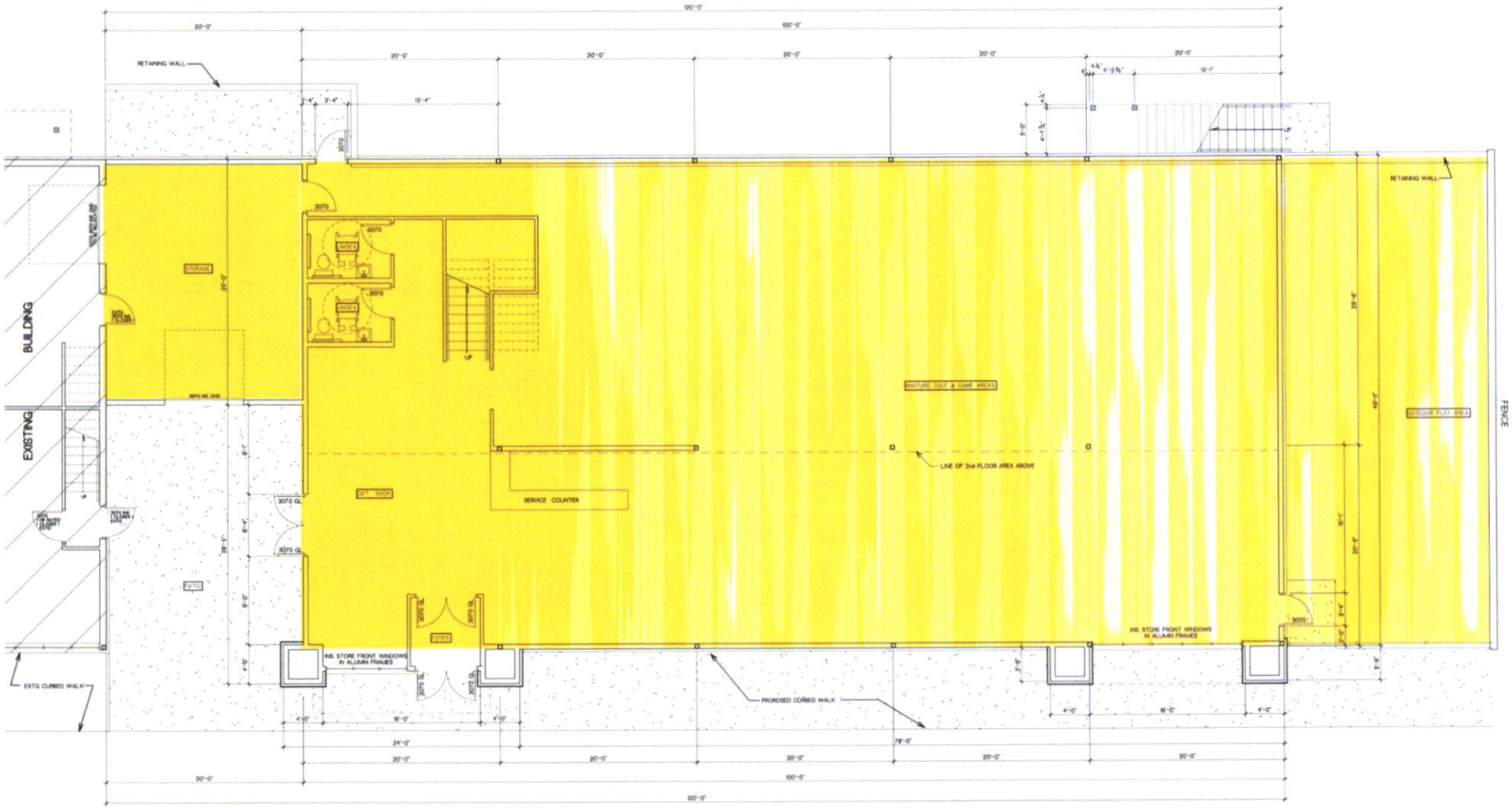
Signature	Date
	08/15/25



SECOND FLOOR PLAN

SCALE 3/16"=1'-0"

ALCOHOL WILL BE CONSUMED AND OR STORED IN THE THE FIRST FLOOR GAME AREA , THE SECOND FLOOR GAME AREA, THE GARAGE STORAGE BUILDING, AND THE FENCED IN OUTDOOR PATIO.



FIRST FLOOR PLAN

SCALE: 3/16"=1'-0"

NOTE: EXISTING BUILDING IS CURRENTLY FULLY SPRINKLERED. BOTH LEVELS OF PROPOSED ADDITION SHALL ALSO BE FULLY SPRINKLERED.

ALCOHOL WILL BE CONSUMED AND OR STORED IN THE THE FIRST FLOOR GAME AREA , THE SECOND FLOOR GAME AREA, THE GARAGE STORAGE BUILDING, AND THE FENCED IN OUTDOOR PATIO.

WISCONSIN DEPARTMENT OF REVENUE
PO BOX 8902
MADISON, WI 53708-8902

Contact Information:

2135 RIMROCK RD PO BOX 8902
MADISON, WI 53708-8902
ph: 608-266-2776 fax: 608-224-5761
email: DORBusinessTax@wisconsin.gov
website: revenue.wi.gov

000070

Letter ID L0656262832

AREA 262 LLC
100 N EDWARDS BLVD
LAKE GENEVA WI 53147-5412

Wisconsin Department of Revenue Seller's Permit

Legal/real name: AREA 262 LLC

Business name:

100 N EDWARDS BLVD
LAKE GENEVA WI 53147-5412

- This certificate confirms you are registered with the Wisconsin Department of Revenue and authorized in the business of selling tangible personal property and taxable services.
- You may not transfer this permit.
- This permit must be displayed at the place of business and is not valid at any other location.
- If your business is not operated from a fixed location, you must carry or display this permit at all events.

Tax Type	Account Type	Account Number
Sales & Use Tax	Seller's Permit	456-1032019676-03

Alcohol License Approvals

Business: Su Wings Chinese Restaurant

License Type: BBeer/CWine

Police-Background Checks Completed and Premises Reviewed

☑ Approved ☐ Denied Signature: Chief Edward Gritzner
Chief Edward Gritzner (Sep 12, 2025 09:14:06 CDT)

Notes:

Fire-Premises Reviewed for Violations

☑ Approved ☐ Denied Signature: Detkowski (Sep 29, 2025 15:24:28 CDT)

Notes:

Building & Zoning-Premises Reviewed for Violations

☑ Approved ☐ Denied Signature: Renee Hanlon
Renee Hanlon (Sep 29, 2025 16:30:43 CDT)

Notes:

Signature:

City Clerk-Applicant is Qualified and Premises is Lawful

☑ Approved ☐ Denied Signature: Lacey L. Reynolds
Lacey L. Reynolds (Sep 17, 2025 15:54:24 CDT)

Notes:

CITY OF LAKE GENEVA
ALCOHOL LICENSE CHECKLIST

Business Name (LLC/INC/CO): Liang's LLC

Trade (dba) Name: Su Wings Chinese Restaurant

Local Address: 743 North Street, Lake Geneva, WI 53147

X	Discuss with City Clerk (or Assistant City Clerk) the desired alcohol license and proposed use
X	**Alcohol Beverage License Application (AB-200)**
X	**Alcohol Beverage Individual Questionnaire (AB-100)** A copy must be submitted for each officer, director, member, manager, and agent of the corporation, LLC, or non-profit organization.
X	**Alcohol Beverage Appointment of Agent (AB-101)**
X	$25 publication fee payable to the City of Lake Geneva and due upon application
X	Proof of Completing Responsible Beverage Server Training Course. Individuals, partners and agents of corporations and LLC's must have successfully completed an approved responsible beverage server training course within the past two years. *Does not apply to individuals who held or were an agent of a corporation or LLC that held a liquor license within the past two years.*
X	Proof of Residency. Applicants must have resided 90 days continuously in this state prior to the date of application. Proof of residency could include voter registration, motor vehicle registration, driver's license, residential lease or purchase agreement, or income tax records. *Officers, directors, members or managers of corporations or LLCs are not required to meet the State residency requirement.*
X	Copy of ✓Wisconsin Seller's Permit (all) & ✓WI DATCP Restaurant Sanitation Standards Compliance ("Class B" Liquor & "Class C" Wine).
X	Map of premises. Applicant must submit a map of the premises, identifying the building(s), room(s), and/or land area under his/her control where alcohol beverages will be sold, served, consumed, or stored. Maps do not need to be drawn to scale but should be clear and legible.
X	**General Business License** & Other Applicable Municipal Licenses. New businesses must also obtain occupancy through the Building & Zoning department.

Application forms may be obtained at City Hall or from the Wisconsin Department of Revenue website, https://www.revenue.wi.gov/Pages/Form/alcohol-Home.aspx

For Office Use Only

Date Filed with Clerk: 9/10/25 Publication & License Fee Receipt: 15-0151463 [Receipt Code: 15:1501]

Amount Paid: $25 Date forwarded to Police Chief: _____

Save | Print | Clear

Form **AB-200**

Alcohol Beverage License Application

For Municipal Use Only	
Municipality	Lake Geneva
License Period	10/1/25-6/30/26

License(s) Requested: (up to two boxes may be checked)

- ☐ Class "A" Beer . . . . . $ _____
- ☑ Class "B" Beer . . . . . $ _____
- ☐ "Class A" Liquor . . . . . $ _____
- ☐ "Class B" Liquor . . . . . $ _____
- ☐ "Class A" Liquor (cider only) $ _____
- ☐ Reserve "Class B" Liquor $ _____
- ☑ "Class C" Liquor (wine only) $ _____

Fees	
License Fees	$
Background Check Fee	$
Publication Fee	$ 25
Total Fees	$

Part A: Premises/Business Information

1. Legal Business Name (individual name if sole proprietorship)
Liang's LLC

2. Business Trade Name or DBA
Su Wings Chinese Restaurant

[redacted]

4. Wisconsin Seller's Permit Number
456-1032118994-02

5. Entity Type *(check one)*
☐ Sole Proprietor ☐ Partnership ☑ Limited Liability Company ☐ Corporation ☐ Nonprofit Organization

6. State of Organization	7. Date of Organization	8. Wisconsin DFI Registration Number
Wisconsin	April 7, 2025	L084608

9. Premises Address
743 North Street

10. City	11. State	12. Zip Code
Lake Geneva	WI	53147

13. County	14. Governing Municipality: ☑ City ☐ Town ☐ Village of: Lake Geneva	15. Aldermanic District
Walworth		

16. Premises Phone	17. Premises Email	18. Website
262-248-1178	suwingslg@gmail.com	suwingslg.com

19. Premises Description - Describe the building or buildings where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.
743 North Street. Bar area and back room for storage. Service in Dining Room 1, 2, 3. Invoice kept in basement office.

20. Mailing Address (if different from premises address)

21. City	22. State	23. Zip Code

Part B: Questions

1. Has the business (sole proprietorship, partnership, limited liability company, or corporation) been convicted of violating federal or state laws or local ordinances? Exclude traffic offenses unless related to alcohol beverages. ☐ Yes ☑ No

If yes, list the details of violation below. Attach additional sheets if necessary.

Law/Ordinance Violated	Location	Trial Date

Penalty Imposed	Was sentence completed? . . . . . ☐ Yes ☐ No

Law/Ordinance Violated	Location	Trial Date

Penalty Imposed	Was sentence completed? . . . . . ☐ Yes ☐ No

2. Are charges for any offenses pending against the business? Exclude traffic offenses unless related to alcohol beverages. ☐ Yes ☑ No

If yes, describe the nature and status of pending charges using the space below. Attach additional sheets as needed.

3. Is the applicant business or any of its officers, directors, members, agent, employees, owners, or other related individuals or entities a restricted investor with any interest in an alcohol beverage producer or distributor? ☐ Yes ☑ No
If yes, provide the name of the restricted investor and describe the nature of the interest.

4. Is the applicant business owned by another business entity? ☐ Yes ☑ No
If yes, provide the name(s) and FEIN(s) of the business entity owners below. Attach additional sheets as needed.

4a. Name of Business Entity	4b. Business Entity FEIN
Liang's LLC	33-4874908

5. Have the partners, agent, or sole proprietor satisfied the responsible beverage server training requirement for this license period? Submit proof of completion. ☑ Yes ☐ No

6. Is the applicant business indebted to any wholesaler beyond 15 days for beer or 30 days for liquor/wine? ☐ Yes ☑ No

7. Does the applicant business owe past due municipal property taxes, assessments, or other fees? ☐ Yes ☑ No

Part C: Individual Information

List the name, title, and phone number for each person or entity holding the following positions in the applicant business or businesses listed in Part B, Question 4: sole proprietor, all officers, directors, and agent of a corporation or nonprofit organization, all partners of a partnership, and all members, managers, and agent of a limited liability company. Attach additional sheets if necessary.

Include Form AB-100 for each person listed below. Corporations and LLCs must appoint an agent by including Form AB-101.

Last Name	First Name	Title	Phone
Liang	Junzhuo	Member	[redacted]
Yan	Dongling	Member	
Liang	Junle	Member	

Part D: Attestation

One of the following must sign and attest to this application:

• sole proprietor • one general partner of a partnership • one corporate officer • one member of an LLC

READ CAREFULLY BEFORE SIGNING: Under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the license. Further, I agree that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another individual or entity. I agree to operate this business according to the law, including but not limited to, purchasing alcohol beverages from state authorized wholesalers. I understand that lack of access to any portion of a licensed premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this license. I understand that any license issued contrary to Wis. Stat. Chapter 125 shall be void under penalty of state law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Yan	Dongling	

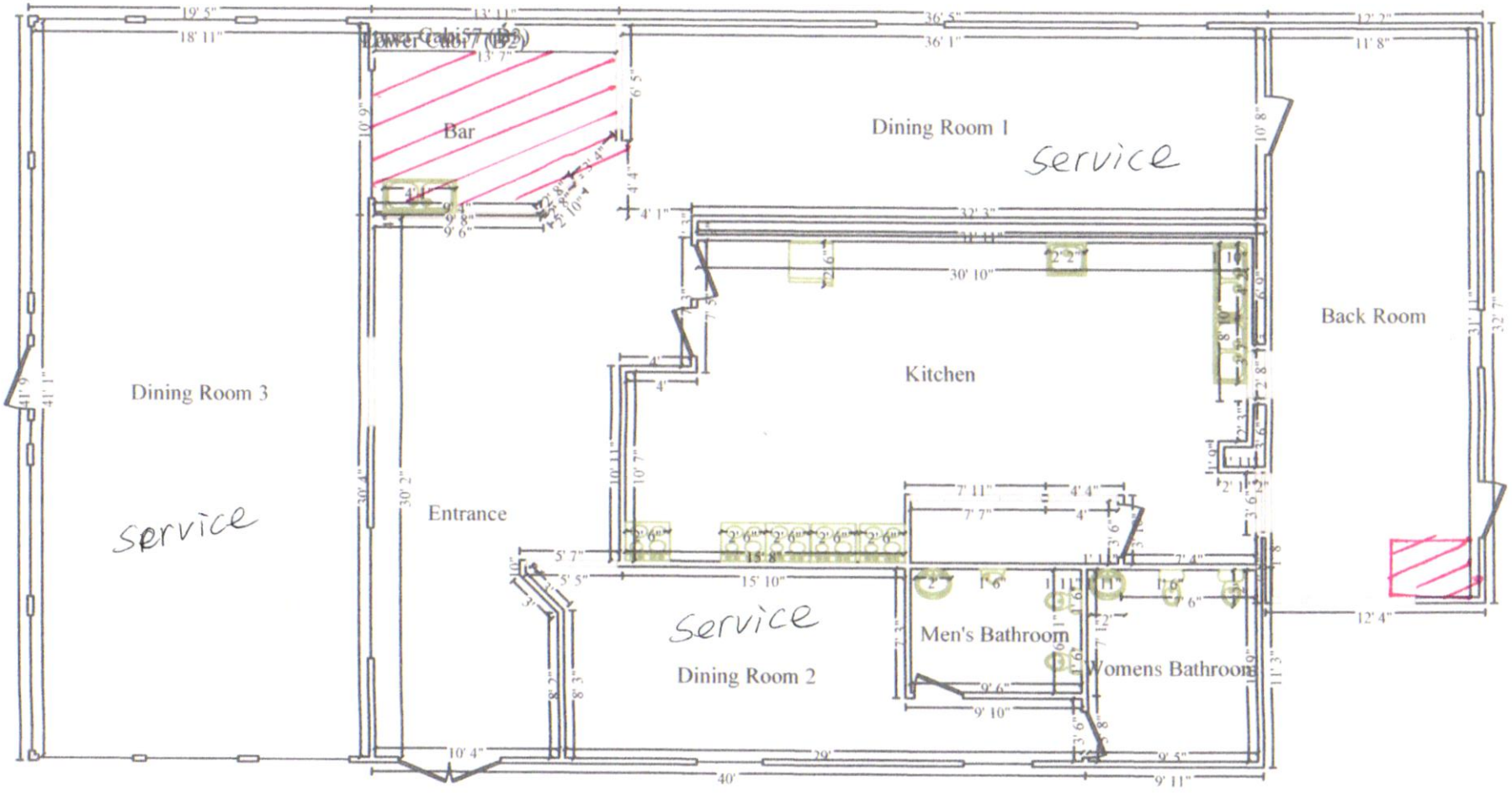
Title	Email	Phone
Member	[redacted]	

Signature	Date
Dongling Yan	

Part E: For Clerk Use Only

Date Application Was Filed With Clerk	License Number	Date License Granted	Date License Issued
9110125			

Signature of Clerk/Deputy Clerk	Date Provisional License Issued (if applicable)



WINE + BEER IN RED

Liangs LLC
d/b/a Su Wings Chinese Restaurant
743 North Street
Lake Geneva, WI 53147

WISCONSIN DEPARTMENT OF REVENUE
PO BOX 8902
MADISON, WI 53708-8902

Contact Information:

2135 RIMROCK RD PO BOX 8902
MADISON, WI 53708-8902
ph: 608-266-2776 fax: 608-224-5761
email: DORBusinessTax@wisconsin.gov
website: revenue.wi.gov

000023

Letter ID L2059078320

LIANG'S LLC
1306 PARK ROW
LAKE GENEVA WI 53147-1334

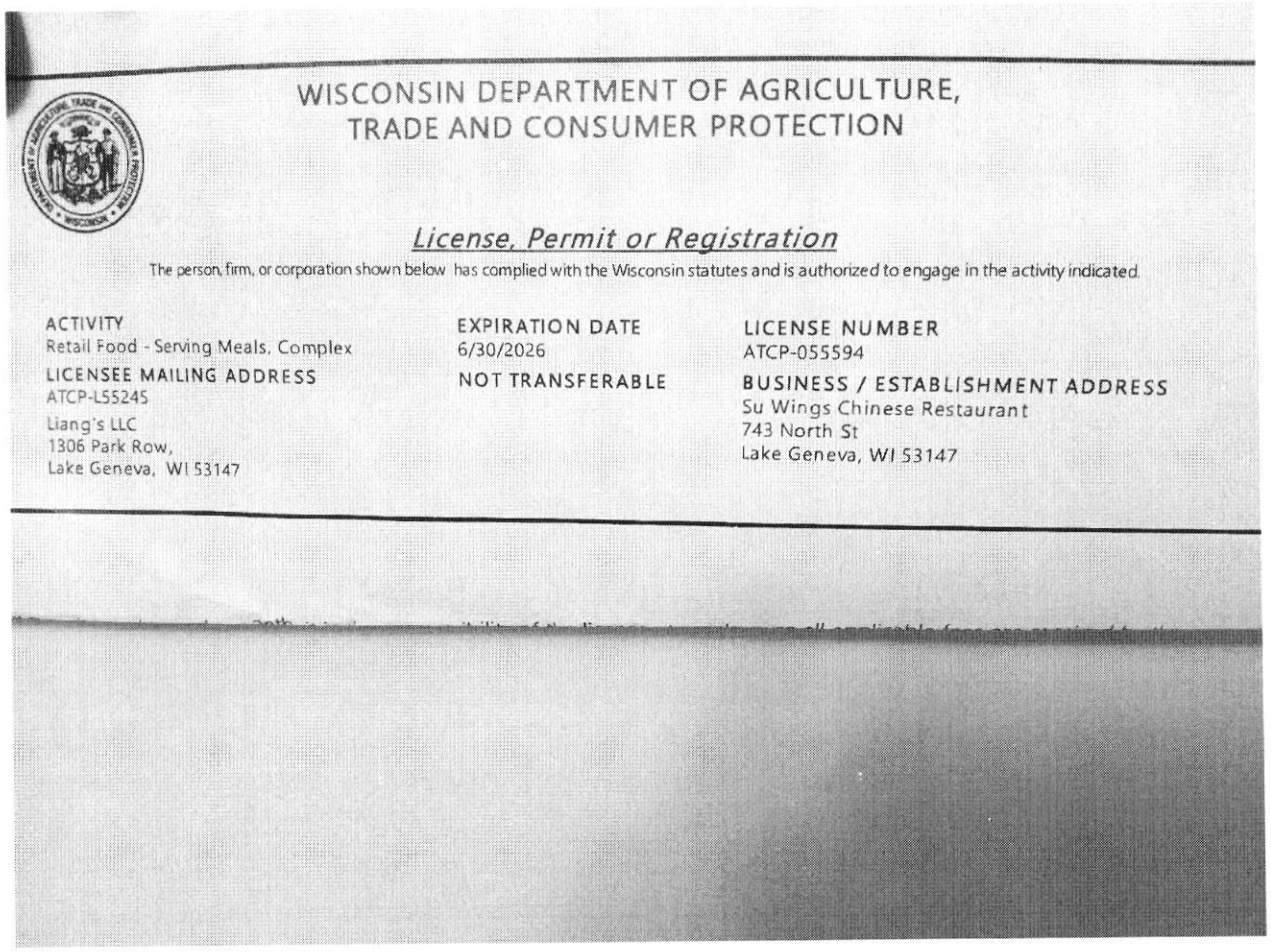
Wisconsin Department of Revenue Seller's Permit

Legal/real name: LIANG'S LLC

Business name: SU WINGS CHINESE RESTAURANT
743 NORTH ST
LAKE GENEVA WI 53147-1437

- This certificate confirms you are registered with the Wisconsin Department of Revenue and authorized in the business of selling tangible personal property and taxable services.
- You may not transfer this permit.
- This permit must be displayed at the place of business and is not valid at any other location.
- If your business is not operated from a fixed location, you must carry or display this permit at all events.

Tax Type	Account Type	Account Numbe
Sales & Use Tax	Seller's Permit	456-1032118994-02



WISCONSIN DEPARTMENT OF AGRICULTURE,
TRADE AND CONSUMER PROTECTION

License, Permit or Registration

The person, firm, or corporation shown below has complied with the Wisconsin statutes and is authorized to engage in the activity indicated.

ACTIVITY
Retail Food - Serving Meals, Complex

LICENSEE MAILING ADDRESS
ATCP-L55245
Liang's LLC
1306 Park Row,
Lake Geneva, WI 53147

EXPIRATION DATE
6/30/2026

NOT TRANSFERABLE

LICENSE NUMBER
ATCP-055594

BUSINESS / ESTABLISHMENT ADDRESS
Su Wings Chinese Restaurant
743 North St
Lake Geneva, WI 53147

Save Print Clear

Form
AB-101

Alcohol Beverage Appointment of Agent

Date

Agent Type *(check one)*

☑ Original (no fee) ☐ Successor ($10 fee for municipal licensees only)

Part A: Business Information

1. Legal Business Name (individual name if sole proprietor)
Liang's LLC

2. Business Trade Name or DBA
Su Wings Chinese Restaurant

3. Entity Type *(check one)*
☑ Limited Liability Company ☐ Corporation ☐ Nonprofit Organization

4. Alcohol Beverage Business Authorization *(check one)*
☑ Municipal Retail License ☐ State Permit

5. If successor agent, provide State Permit or Municipal Retail License Number

6. Describe the reason for appointing a successor agent, if successor is checked above.

Part B: Agent Information

1. Last Name
Yan

2. First Name
Dongling

3. M.I.

[redacted]

8. State
WI

[redacted]

Part C: Agent Questions

1. Have you satisfied the responsible beverage server training requirement? Submit proof of completion. ☑ Yes ☐ No

2. Have you completed Form AB-100, *Alcohol Beverage Individual Questionnaire* (licensee) or Form AB-300, *Alcohol Beverage Personal Questionnaire* (permittee)? ☑ Yes ☐ No

3. Have you been a Wisconsin resident for at least 90 continuous days? See instructions for exceptions. ☑ Yes ☐ No

Continued →

Part D: Business Attestation

READ CAREFULLY BEFORE SIGNING: I, the **Undersigned**, authorize the above-named individual to act for the above-named corporation, nonprofit organization, or limited liability company with full authority and control of the premises and of all alcohol beverage activities on such premises. I certify that I am authorized by the above-named entity to authorize this individual to act on behalf of the entity. If I am appointing a successor agent, I rescind all previous agent appointments for this premises. Further, I understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Yan	Dongling	

Title	[redacted]
Member	

Signature	Date
Dongling Yan	9-9-2025

Part E: Agent Attestation

READ CAREFULLY BEFORE SIGNING: I, the **Agent**, hereby accept this appointment as agent for the above-named corporation, nonprofit organization, or limited liability company and assume full responsibility for the conduct of all alcohol beverage activities on the premises for the above-named business. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than $1,000 if convicted.

Last Name	First Name	M.I.
Yan	Dongling	

Signature	Date
Dongling Yan	9-9-2025

Complimentary Riviera Ballroom Event Request

Date of Event: November 11, 2025

Hours of Event: 4:00 – 5:00

Name of Event: Veteran's Day Program

Person(s) Responsible: Wendy Finley Youth Services Librarian

Address: 918 W. Main St. Lake Geneva, WI 53147

Phone Number: 262-249-5299

Email: wfinley@lglibrary.org

Estimated number of guests attending : 200 +

Food to be served? Yes/No

Liquor to be served? Yes / No *(no cash bar)*

Value of Request (See The Riviera Ballroom website for rental rates) :

*Valid for no charge events that will be open to the public or part of a community enrichment special event. Special event permit to be applied for separately, if applicable.

Completed forms to be submitted to lakegenevariviera@gmail.com to begin the approval process.

Estimated payroll cost: $600

Approval from Finance, Licensing & Regulations Committee, Date: _____

Approval from Common Council, Date: _____

Complimentary Riviera Ballroom Event Request

Date of Event: 12/21/2025

Hours of Event: Rehearsal 12:00; 2:00 Concert, 4:00 Concert

Name of Event: A Lake Geneva Holiday Concert

Person(s) Responsible: Allan Dennis

Address: MyAC
878 Lyckr Road, Highwood, IL 60040

Phone Number: 847/926-9888; 224-610-6688

Email: allandennis@myaa.org

Estimated number of guests attending: 60 orchestra; 150 audience each concert

Food to be served? Yes / (No)

Liquor to be served? Yes / (No) *(no cash bar)*

Value of Request (See The Riviera Ballroom website for rental rates) :

$1,000

*Valid for no charge events that will be open to the public or part of a community enrichment special event. Special event permit to be applied for separately, if applicable.

No charge to attend! Only need to sign up

Completed forms to be submitted to lakegenevariviera@gmail.com to begin the approval process.

Estimated payroll cost: $600

Approval from Finance, Licensing & Regulations Committee, Date: _____

Approval from Common Council, Date: _____

CITY OF LAKE GENEVA
CITY CLERK'S OFFICE
626 Geneva Street, Lake Geneva, WI 53147- (262) 248-3673-*www.cityoflakegeneva.*

Date: October 10, 2025

To: City Council

Re: Complimentary Riviera Event Request Form for A Lake Geneva Concert filed by Allan Dennis on behalf of Midwest Young Artists (MYA)

The purpose of this memo is to give historical information on a similar prior request from this group. Mr. Dennis and MYA previously filed a form for an event using the Riviera Ballroom in August of 2024.

This form was considered for recommendation at the Finance, Licensing, & Regulation Committee meeting on July 2, 2024, where the Committee recommended approval to the Council on a 3-2 voice vote. The form was then considered for approval by the Council on July 8, 2024. After discussion, the group was granted a 50% comp rate on the $1000 rental fee, paying $500 of that fee to cover costs. The minutes from the July 8, 2024, Council meeting are attached along with this memo for reference.

If there are any questions, I request that Council members send them to the Clerk's Office prior to the meeting so that answers can be researched and provided at the meeting. Questions regarding Riviera Ballroom event booking and the complimentary program in general can be directed to the Special Events Coordinator.

Respectfully submitted,

Vanessa Jahns
Deputy City Clerk

1224 Pine Street
Burlington, WI 53105
T: 262.767.2747 • F: 414.351.4117

MEMORANDUM TO THE CITY OF LAKE GENEVA

To: Erick Nicia, Neil Waswo

From: Bridget Barry, PE

CC: Naomi Rauch, PE

Date: September 11, 2025

Re: Pay Request #2 for Lagoon Seawall Replacement

A review of the Request for **Payment No. 2** from **CK Contractors, LLC,** for the **Lagoon Seawall Replacement Project** construction contract has been completed. This will be the final pay application.

Payment in the amount of **$3,275.71** for this payment request has been recommended for approval by the Construction Manager on site.

The payment amounts are as follows:

	New Invoice Amount	Previously Invoiced	Total
Invoiced	-	$134,295.33	$134,295.33
Retainage (5% until 50% complete)	$3,275.71	$(3,275.71)	$(3,275.71)
Total Approved for Payment	**$3,275.71**	**$131,019.63**	**$134,295.33**

Contract Base Bid, based on plan quantities: $131,028.20
Contract price after CCO1 $143,623.48

Please feel free to contact me if you have any questions.

Please send Payment to:
CK Contractors, LLC
Attention:
Chris Klemko
17622 Burlington Rd.
Suite 2
Union Grove, WI 53182

EJCDC
ENGINEERS JOINT CONTRACT DOCUMENTS COMMITTEE

Contractor's Application for Payment No. 2

Application Period: 6/3/2025-7/10/2025 (PROJECT CLOSEOUT)		Application Date: 9/11/2025
To (Owner): City of Lake Geneva 626 Geneva St WI Lake Geneva 53147	From (Contractor): CK Contractors LLC 17622 Burlington Rd. STE. 2 Union Grove, WI 53182	Via (Engineer): Kapur & Associates 1224 S Pine St Burlington WI 53105
Project: Lagoon Seawall Replacement	Contract: Lagoon Seawall Replacement	
Owner's Contract No.:	Contractor's Project No.:	Engineer's Project No.: 230152.11

Application For Payment

Change Order Summary

Approved Change Orders

Number	Additions	Deductions
1	$12,595.28	
TOTALS	$12,595.28	
NET CHANGE BY CHANGE ORDERS	**$12,595.28**	

Contractor's Certification

The undersigned Contractor certifies, to the best of its knowledge, the following:
(1) All previous progress payments received from Owner on account of Work done under the Contract have been applied on account to discharge Contractor's legitimate obligations incurred in connection with the Work covered by prior Applications for Payment;
(2) Title to all Work, materials and equipment incorporated in said Work, or otherwise listed in or covered by this Application for Payment, will pass to Owner at time of payment free and clear of all Liens, security interests, and encumbrances (except such as are covered by a bond acceptable to Owner indemnifying Owner against any such Liens, security interest, or encumbrances); and
(3) All the Work covered by this Application for Payment is in accordance with the Contract Documents and is not defective.

Contractor Signature

By: [signature] Date: 9-22-2025

1. ORIGINAL CONTRACT PRICE	$	**$131,028.20**
2. Net change by Change Orders	$	**$12,595.28**
3. Current Contract Price (Line 1 ± 2)	$	**$143,623.48**
4. TOTAL COMPLETED AND STORED TO DATE (Column F total on Progress Estimates)	$	**$134,295.33**
5. RETAINAGE:		
a. X _____ Work Completed	$	
b. X _____ Stored Material	$	
c. Total Retainage (Line 5.a + Line 5.b)	$	
6. AMOUNT ELIGIBLE TO DATE (Line 4 - Line 5.c)	$	**$134,295.33**
7. LESS PREVIOUS PAYMENTS (Line 6 from prior Application)	$	**$131,019.63**
8. AMOUNT DUE THIS APPLICATION	$	**$3,275.70**
9. BALANCE TO FINISH, PLUS RETAINAGE (Column G total on Progress Estimates + Line 5.c above)	$	

Payment of: $ THREE THOUSAND TWO HUNDRED SEVENTY-FIVE DOLLARS AND SEVENTY CENTS
(Line 8 or other - attach explanation of the other amount)

is recommended by: [signature] (Engineer) 9/23/25 (Date)

Payment of: $ _____
(Line 8 or other - attach explanation of the other amount)

is approved by: _____ (Owner) _____ (Date)

Approved by: _____ Funding or Financing Entity (if applicable) _____ (Date)

© 2013 National Society of Professional Engineers for EJCDC. All rights reserved.

Geneva Lake Seawall Replacement - General Bid Tab

City of Lake Geneva, Walworth County, Wisconsin

Payment Tab Dated:	**6/3/2025**	**9/11/2025**
Quantities Through Date:	6/2/2025	

SEAWALL REPLACEMENT

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
205.0100	Excavation Common	CY	80	$ 165.00	$ 13,200.00	80.00	-	80.00	$ 13,200.00
512.1000	Temporary Sheet Piling and Dewatering	LS	1	$ 28,975.00	$ 28,975.00	1.00	-	1.00	$ 28,975.00
612.0104	Pipe Underdrain 4-Inch	LF	52	$ 70.00	$ 3,640.00	52.00	-	52.00	$ 3,640.00
616.0600.S	Temporary Fence (Chain-Link)	LF	350	$ 20.00	$ 7,000.00	-	-	0.00	$ -
628.7504	Temporary Ditch Checks	LF	45	$ 21.50	$ 967.50	-	-	0.00	$ -
SPV.0060.05	Nyloplast Drain Basin and Inline Drain	EACH	1	$ 1,460.00	$ 1,460.00	1.00	-	1.00	$ 1,460.00
SPV.0105.01	Lagoon Seawall Removal	LS	1	$ 32,360.00	$ 32,360.00	1.00	-	1.00	$ 32,360.00
SPV.0180.01	Restore Disturbed Areas	SY	115	$ 36.50	$ 4,197.50	115.00	-	115.00	$ 4,197.50
SPV.0105.02	Reinforced Poured Concrete Lagoon Seawall	LS	1	$ 39,228.20	$ 39,228.20	0.97	-	0.97	$ 37,867.55
	SEAWALL REPLACEMENT SUBTOTAL			$	131,028.20	PAID TO DATE		**$**	**121,700.05**
	SUBTOTAL $ PER ESTIMATE - SEAWALL REPLACEMENT					$ 121,700.05	$ -		

CO1

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
CCO Item 1	4" Concrete Sidewalk	SF	332	$ 18.78	$ 6,234.96	332.00	-	332.00	$ 6,234.96
CCO Item 2	Additional Boulder Placement	TONS	10	$ 267.60	$ 2,676.00	10.00	-	10.00	$ 2,676.00
CCO Item 3	Additional Engineering Fee	LS	1	$ 3,684.32	$ 3,684.32	1.00	-	1.00	$ 3,684.32
	CO1 SUBTOTAL			$	12,595.28	PAID TO DATE		**$**	**12,595.28**
	SUBTOTAL $ PER ESTIMATE - CO1					$ 12,595.28	$ -		

Subtotal $ per Estimate	$ 134,295.33	$ -	
Retainage per Estimate	$ (3,275.70)	$ 3,275.70	
Total Paid per Estimate	$ 131,019.63	$ 3,275.70	
TOTAL - BASE BID	**$ 131,028.20**	**TOTAL - Paid to Date**	**$ 134,295.33**
		Less Retainage Held	**$ -**
		TOTAL - Paid to Date, Less Retainage	**$ 134,295.33**

1224 Pine Street
Burlington, WI 53105
T: 262.767.2747 • F: 414.351.4117

MEMORANDUM TO THE CITY OF LAKE GENEVA

To: Tom Earle, Neil Waswo, David Winger

From: Bridget Barry, PE

CC: Naomi Rauch, Mike Timmers

Date: October 1, 2025

Re: Pay Request #2 for 2025 Basketball and Tennis Courts Resurfacing

A review of the Request for **Payment No. 2** from **Cichinni Asphalt, LLC,** for the **2025 Basketball and Tennis Courts Resurfacing** construction contract has been completed.

Payment in the amount of **$ 75,866.00** for this payment request has been recommended for approval by the Construction Manager on site.

The Contractor's documents are enclosed for the City's approval.

Payment amounts are as follows:

	New Invoice Amount	Previously Invoiced	Total
Invoiced	$ 75,866.00	$ 110,917.96	$ 186,783.96
Retainage (5% until 50% complete)	$ (0.00)	$ (5,088.20)	$ (5,088.20)
Total Approved for Payment	$ 75,866.00	**$ 105,829.76**	$ 181,695.76

Contract Base Bid, based on plan quantities: $203,528.00

Please feel free to contact me if you have any questions.

Please send Payment to:
Cichinni Asphalt, LLC

Attention:
Greg Krahn
4700 52nd Ave
Kenosha WI53144

EJCDC
ENGINEERS JOINT CONTRACT DOCUMENTS COMMITTEE

Contractor's Application for Payment No. 2

	Application Period: 8/19/2025-9/25/2025	Application Date:	10/1/2025
To (Owner): City of Lake Geneva 626 Geneva Street, Lake Geneva WI 53147	From (Contractor): Cicchini Asphalt Inc	Via (Engineer):	Kapur & Associates 1224 S. Pine St. Burlington WI 53105
Project: Basketball & Tennis Courts Resurfacing	Contract: 2025 Basketball & Tennis Courts Resurfacing		
Owner's Contract No.:	Contractor's Project No.:	Engineer's Project No.:	24.0485

Application For Payment

Change Order Summary

Approved Change Orders

Number	Additions	Deductions
TOTALS		
NET CHANGE BY CHANGE ORDERS		

Contractor's Certification

The undersigned Contractor certifies, to the best of its knowledge, the following:
(1) All previous progress payments received from Owner on account of Work done under the Contract have been applied on account to discharge Contractor's legitimate obligations incurred in connection with the Work covered by prior Applications for Payment;
(2) Title to all Work, materials and equipment incorporated in said Work, or otherwise listed in or covered by this Application for Payment, will pass to Owner at time of payment free and clear of all Liens, security interests, and encumbrances (except such as are covered by a bond acceptable to Owner indemnifying Owner against any such Liens, security interest, or encumbrances); and
(3) All the Work covered by this Application for Payment is in accordance with the Contract Documents and is not defective.

Contractor Signature

By:	Date:

1. **ORIGINAL CONTRACT PRICE**	$	**$203,528.00**
2. **Net change by Change Orders**	$	
3. **Current Contract Price (Line 1 ± 2)**	$	**$203,528.00**
4. **TOTAL COMPLETED AND STORED TO DATE (Column F total on Progress Estimates)**	$	**$186,783.96**
5. **RETAINAGE:**		
a. **5% X _____ Work Completed**	$	**$5,088.20**
b. **X _____ Stored Material**	$	
c. **Total Retainage (Line 5.a + Line 5.b)**	$	**$5,088.20**
6. **AMOUNT ELIGIBLE TO DATE (Line 4 - Line 5.c)**	$	**$181,695.76**
7. **LESS PREVIOUS PAYMENTS (Line 6 from prior Application)**	$	**$105,829.76**
8. **AMOUNT DUE THIS APPLICATION**	$	**$75,866.00**
9. **BALANCE TO FINISH, PLUS RETAINAGE (Column G total on Progress Estimates + Line 5.c above)**	$	**$5,088.20**

Payment of: $ SEVENTY-FIVE THOUSAND EIGHT HUNDRED AND SIXTY-SIX DOLLARS AND ZERO CENTS
(Line 8 or other - attach explanation of the other amount)

is recommended by: _____ (Engineer) 10/1/25 (Date)

Payment of: $ _____
(Line 8 or other - attach explanation of the other amount)

is approved by: _____ (Owner) _____ (Date)

Approved by: _____ Funding or Financing Entity (if applicable) _____ (Date)

© 2013 National Society of Professional Engineers for EJCDC. All rights reserved.

Geneva Lake Seawall Replacement - General Bid Tab | **Payment Tab Dated:** | 8/20/2025 | 10/1/2025

City of Lake Geneva, Walworth County, Wisconsin | Quantities Through Date: | 8/18/2025 | 9/26/2025

TENNIS (MAPLE)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
SPV.0090.01	Armor Crack Repair System	LF	600	$ 5.00	$ 3,000.00	-	600.00	600.00	$ 3,000.00
SPV.0090.02	Textured White Lines, 2"	LF	960	$ 2.00	$ 1,920.00	-		0.00	$ -
SPV.0180.02	Acrylic Resurfacer Flex (Two Coats)	SY	1360	$ 6.50	$ 8,840.00	-	1,360.00	1360.00	$ 8,840.00
SPV.0180.03	Acrylic Paint Flex - light green/dark green (Two Coats)	SY	1360	$ 6.50	$ 8,840.00	-		0.00	$ -
				$	22,600.00	IS (MAPLE) SUBTOTAL - PAID TO DATE		$	**11,840.00**
				SUBTOTAL $ PER ESTIMATE - TENNIS (MAPLE)		$ -	$ 11,840.00		

PICKLEBALL (DUNN)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
SPV.0090.01	Armor Crack Repair System	LF	450	$ 5.00	$ 2,250.00	-	450.00	450.00	$ 2,250.00
SPV.0090.02	Textured White Lines, 2"	LF	1584	$ 2.00	$ 3,168.00	-	1,188.00	1188.00	$ 2,376.00
SPV.0180.02	Acrylic Resurfacer Flex (Two Coats)	SY	1400	$ 6.50	$ 9,100.00	-	1,400.00	1400.00	$ 9,100.00
SPV.0180.03	Acrylic Paint Flex - light green/dark green (Two Coats)	SY	1400	$ 6.50	$ 9,100.00	-	1,400.00	1400.00	$ 9,100.00
				$	23,618.00	LL (DUNN) SUBTOTAL - PAID TO DATE		$	**22,826.00**
				SUBTOTAL $ PER ESTIMATE - PICKLEBALL (DUNN)		$ -	$ 22,826.00		

BASKETBALL (VETERANS)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
204.011	Removing Asphaltic Surface - FULL DEPTH (Contingency, Bike Path)	SY	125	$ 10.00	$ 1,250.00	188.22	-	188.22	$ 1,882.20
205.01	Excavation Common	CY	333	$ 50.00	$ 16,650.00	333.00	-	333.00	$ 16,650.00
205.01	Excavation Common (Contingency, Bike Path)	CY	42	$ 50.00	$ 2,100.00	52.81	-	52.81	$ 2,640.50
305.012	Base Aggregate Dense 1 1/4-Inch	TON	666	$ 30.00	$ 19,980.00	634.78	-	634.78	$ 19,043.40
305.012	Base Aggregate Dense 1 1/4-Inch (Contingency, Bike Path)	TON	84	$ 30.00	$ 2,520.00	-	-	0.00	$ -
460.5225	HMA Pavement Type 5LT 58-28 S, Item Includes Tack Coat	TON	230	$ 162.00	$ 37,260.00	274.77	-	274.77	$ 44,512.74
460.5225	HMA Pavement Type 5LT 58-28 S, Item Includes Tack Coat (Contingency, Bike Path)	TON	25	$ 162.00	$ 4,050.00	25.00	-	25.00	$ 4,050.00
SPV.0090.02	Textured White Lines, 2"	LF	850	$ 2.00	$ 1,700.00	-	850.00	850.00	$ 1,700.00
SPV.0090.03	Textured Yellow Lines, 2"	LF	750	$ 2.00	$ 1,500.00	-	750.00	750.00	$ 1,500.00
SPV.0105.01	Fencing Remove and Replace	LS	1	$ 10,000.00	$ 10,000.00	-	1.00	1.00	$ 10,000.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A	SY	1100	$ 8.00	$ 8,800.00	454.89	-	454.89	$ 3,639.12
SPV.0180.02	Acrylic Resurfacer Flex (Two Coats)	SY	1000	$ 6.50	$ 6,500.00	-	1,000.00	1000.00	$ 6,500.00
SPV.0180.03	Acrylic Paint Flex - Green (Two Coats)	SY	1000	$ 6.50	$ 6,500.00	-	1,000.00	1000.00	$ 6,500.00
SPV.0180.04	Geotextile NX750 (Undistributed)	SY	1000	$ 8.50	$ 8,500.00	1,000.00	-	1000.00	$ 8,500.00
				$	127,310.00	VETERANS) SUBTOTAL - PAID TO DATE		$	**127,117.96**
				SUBTOTAL $ PER ESTIMATE - BASKETBALL (VETERANS)		$ 100,917.96	$ 26,200.00		

Mandatory Additional Bid 1 (DUNN)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
SPV.0150.02	Tennis Net Post Ground Sleeve Removal and Restoration	LS	1	$ 10,000.00	$ 10,000.00	1.00		1.00	$ 10,000.00
				$	10,000.00	d 1 (DUNN) SUBTOTAL - PAID TO DATE		$	**10,000.00**
				SUBTOTAL $ PER ESTIMATE - Mandatory Additional Bid 1 (DUNN)		$ 10,000.00	$ -		

Mandatory Additional Bid 2 (DUNN)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	Quantities per Estimate #2	Qty to Date	$ Paid to Date
SPV.0060.01	Pickleball Net	EA	8	$ 2,500.00	$ 20,000.00		6.00	6.00	$ 15,000.00
				$	20,000.00	d 2 (DUNN) SUBTOTAL - PAID TO DATE		$	**15,000.00**
				SUBTOTAL $ PER ESTIMATE - Mandatory Additional Bid 2 (DUNN)		$ -	$ 15,000.00		

Subtotal $ per Estimate	$ 110,917.96	$ 75,866.00		
Retainage per Estimate	$ (5,088.20)	$ -		
Total Paid per Estimate	$ 105,829.76	$ 75,866.00		
TOTAL - BASE BID	**$ 203,528.00**	**TOTAL - Paid to Date**	**$**	**186,783.96**
		Less Retainage Held	**$**	**(5,088.20)**
		TOTAL - Paid to Date, Less Retainage	**$**	**181,695.76**

1224 Pine Street
Burlington, WI 53105
T: 262.767.2747 • F: 414.351.4117

MEMORANDUM TO THE CITY OF LAKE GENEVA

To: Neil Waswo, Tom Earle

From: Bridget Barry, Mumangi Nyangureta

CC: Naomi Rauch, Mike Timmers

Date: October 1st, 2025

Re: Pay Request #3 for 2025 Lake Geneva Street Program

A review of the Request for **Payment No. 3** from **Wolf Paving** for the **2025 Lake Geneva Street Program** construction contract has been completed.

Payment in the amount of **$48,920.27** for this payment request has been recommended for approval by the Construction Manager on site.

The Contractor's documents are enclosed for the City's approval.

Payment amounts are broken up as follows:

	New Invoice Amount	Previously Invoiced	Total
Invoiced	$ 51,495.02	$ 297,732.32	$ 349,227.34
Retainage (5% until 50% complete)	$ (2574.75)	$ (14,886.62)	$ (17,461.37)
Total Approved for Payment	$ 48,920.27	$ 282,845.70	$ 33,1765.97

Contract Base Bid, based on plan quantities: $846,152.20
Contract Base Bid plus Change Orders 1&2, based on plan quantities: $868,677.20

Please feel free to contact me if you have any questions.

Please send Payment to: **Wolf Paving**

Attention:

Allan Griffin
1320 Walnut Ridge Dr.
Suite 100
Harland, WI 53029

EJCDC
ENGINEERS JOINT CONTRACT DOCUMENTS COMMITTEE

Contractor's Application for Payment No. 3

	Application Period: 8/15/2025-9/15/2025	Application Date:	10/1/2025
To (Owner):	City of Lake Geneva 626 Geneva Street, Lake Geneva WI 53147	From (Contractor):	Wolf Paving
Via (Engineer):	Kapur & Associates 1224 S. Pine St. Burlington WI 53105		
Project:	2025 Lake Geneva Street Program	Contract:	2025 Lake Geneva Street Program
Owner's Contract No.:		Contractor's Project No.:	
Engineer's Project No.:	25.0249		

Application For Payment

Change Order Summary

Approved Change Orders		
Number	Additions	Deductions
CCO 1	$22,130.00	
CCO 2	$395.00	
TOTALS	$22,525.00	
NET CHANGE BY CHANGE ORDERS	**$22,525.00**	

Contractor's Certification

The undersigned Contractor certifies, to the best of its knowledge, the following:
(1) All previous progress payments received from Owner on account of Work done under the Contract have been applied on account to discharge Contractor's legitimate obligations incurred in connection with the Work covered by prior Applications for Payment;
(2) Title to all Work, materials and equipment incorporated in said Work, or otherwise listed in or covered by this Application for Payment, will pass to Owner at time of payment free and clear of all Liens, security interests, and encumbrances (except such as are covered by a bond acceptable to Owner indemnifying Owner against any such Liens, security interest, or encumbrances); and
(3) All the Work covered by this Application for Payment is in accordance with the Contract Documents and is not defective.

Contractor Signature

By: Date: 10/1/2025

1. ORIGINAL CONTRACT PRICE	**$**	**$846,152.20**
2. Net change by Change Orders	**$**	**$22,525.00**
3. Current Contract Price (Line 1 ± 2)	**$**	**$868,677.20**
4. TOTAL COMPLETED AND STORED TO DATE (Column F total on Progress Estimates)	**$**	**$349,227.34**
5. RETAINAGE:		
a. 5% X $349,227.34 **Work Completed**	**$**	**$17,461.37**
b. X Stored Material	**$**	
c. Total Retainage (Line 5.a + Line 5.b)	**$**	**$17,461.37**
6. AMOUNT ELIGIBLE TO DATE (Line 4 - Line 5.c)	**$**	**$331,765.97**
7. LESS PREVIOUS PAYMENTS (Line 6 from prior Application)	**$**	**$282,845.70**
8. AMOUNT DUE THIS APPLICATION	**$**	**$48,920.27**
9. BALANCE TO FINISH, PLUS RETAINAGE (Column G total on Progress Estimates + Line 5.c above)	**$**	**$519,449.86**

Payment of: $ TWO HUNDRED EIGHTY-TWO THOUSAND, EIGHT HUNDRED FORTY-FIVE DOLLARS AND SEVENTY CENTS
(Line 8 or other - attach explanation of the other amount)

is recommended by: (Engineer) 10/1/25 (Date)

Payment of: $
(Line 8 or other - attach explanation of the other amount)

is approved by: (Owner) (Date)

Approved by: Funding or Financing Entity (if applicable) (Date)

© 2013 National Society of Professional Engineers for EJCDC. All rights reserved.

2025 Lake Geneva Street Program - PAYMENT TAB

City of Lake Geneva, Walworth County, Wisconsin

Payment Tab Dated:	**6/26/2025**	**8/21/2025**	**10/1/2025**
Quantities Through Date:	6/23/2025	8/15/2025	9/15/2025

Base Bid Section - BROAD ST (MAIN TO WRIGLEY)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0100	Removing Concrete Pavement (Crosswalk)	SY	70	$ 36.50	$ 2,555.00	-	-	-	0.00	$ -
204.0100	Removing Concrete Pavement (Driveways)	SY	40	$ 27.50	$ 1,100.00	-	-	-	0.00	$ -
204.0120	Removing Asphaltic Surface Milling (Partial Depth 2")	SY	2475	$ 4.00	$ 9,900.00	-	-	-	0.00	$ -
204.0150	Removing Curb & Gutter	LF	320	$ 11.50	$ 3,680.00	-	-	-	0.00	$ -
204.0155	Removing Concrete Sidewalk	SY	275	$ 27.50	$ 7,562.50	-	-	-	0.00	$ -
205.0100	Excavation Common - EBS (Undistributed)	CY	275	$ 26.00	$ 7,150.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	290	$ 27.30	$ 7,917.00	-	-	-	0.00	$ -
311.0110	Breaker Run (3" Crushed Allowed) - EBS (Undistributed)	TON	290	$ 28.00	$ 8,120.00	-	-	-	0.00	$ -
405.0200	Coloring Concrete Custom	CY	15	$ 100.00	$ 1,500.00	-	-	-	0.00	$ -
415.0080	Concrete Pavement 8-Inch	SY	70	$ 108.00	$ 7,560.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	300	$ 92.00	$ 27,600.00	-	-	-	0.00	$ -
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	320	$ 63.00	$ 20,160.00	-	-	-	0.00	$ -
602.0405	Concrete Sidewalk 4-Inch	SF	1310	$ 8.65	$ 11,331.50	-	-	-	0.00	$ -
602.0415	Concrete Sidewalk 6-Inch	SF	560	$ 9.80	$ 5,488.00	-	-	-	0.00	$ -
602.0505	Curb Ramp Detectable Warning Field Yellow	SF	20	$ 50.00	$ 1,000.00	-	-	-	0.00	$ -
611.8105	Adjusting Catch Basin Covers	EACH	5	$ 850.00	$ 4,250.00	-	-	-	0.00	$ -
611.8110	Adjusting Manhole Covers	EACH	6	$ 550.00	$ 3,300.00	-	-	-	0.00	$ -
628.7020	Inlet Protection Type D	EACH	5	$ 110.00	$ 550.00	-	-	-	0.00	$ -
638.2102	Moving Signs Type II	EACH	1	$ 160.00	$ 160.00	-	-	-	0.00	$ -
646.1020	Marking Line Epoxy 4-Inch (White)	LF	1800	$ 3.25	$ 5,850.00	-	-	-	0.00	$ -
646.1020	Marking Line Epoxy 4-Inch (Yellow)	LF	735	$ 4.50	$ 3,307.50	-	-	-	0.00	$ -
646.5020	Marking Arrow Epoxy (White)	EACH	3	$ 250.00	$ 750.00	-	-	-	0.00	$ -
646.5120	Marking Word Epoxy "NO PARKING" (Yellow)	EACH	2	$ 260.00	$ 520.00	-	-	-	0.00	$ -
646.5120	Marking Word Epoxy "ONLY" (White)	EACH	2	$ 275.00	$ 550.00	-	-	-	0.00	$ -
646.5220	Marking Symbol Epoxy, ADA Accessible (Blue)	EACH	3	$ 185.00	$ 555.00	-	-	-	0.00	$ -
646.5220	Marking Symbol Epoxy, Motorcycle (White)	EACH	1	$ 250.00	$ 250.00	-	-	-	0.00	$ -
646.6120	Marking Stop Line Epoxy 18-Inch (White)	LF	35	$ 16.00	$ 560.00	-	-	-	0.00	$ -
646.8105	Marking Curb Paint (Yellow)	LF	60	$ 8.00	$ 480.00	-	-	-	0.00	$ -
690.0150	Sawing Asphalt	LF	160	$ 1.39	$ 222.40	-	-	-	0.00	$ -
690.0250	Sawing Concrete	LF	800	$ 2.10	$ 1,680.00	-	-	-	0.00	$ -
SPV.0060.01	Adjusting Valve Boxes	EACH	8	$ 450.00	$ 3,600.00	-	-	-	0.00	$ -
SPV.0060.02	Sanitary Manhole Frame and Cover (R-1580 Neenah)	EACH	4	$ 900.00	$ 3,600.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 17,500.00	$ 17,500.00	-	-	-	0.00	$ -
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	825	$ 7.50	$ 6,187.50	-	-	-	0.00	$ -
	Base Bid Section - BROAD ST (MAIN TO WRIGLEY) SUBTOTAL				$ 176,496.40			PAID TO DATE		$ -
	SUBTOTAL $ PER ESTIMATE - Base Bid Section - BROAD ST (MAIN TO WRIGLEY)					$ -	$ -	$ -		

LAKEWOOD DR (ORCHARD TO EVERGREEN)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0120	Removing Asphaltic Surface Milling (Partial Depth 2")	SY	1175	$ 4.57	$ 5,369.75	-	-	-	0.00	$ -
205.0100	Excavation Common - EBS (Undistributed)	CY	200	$ 30.00	$ 6,000.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	200	$ 26.85	$ 5,370.00	-	-	-	0.00	$ -
311.0110	Breaker Run (3" Crushed Allowed) - EBS (Undistributed)	TON	200	$ 26.85	$ 5,370.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	145	$ 95.00	$ 13,775.00	-	-	-	0.00	$ -
611.8105	Adjusting Catch Basin Covers	EACH	3	$ 850.00	$ 2,550.00	-	-	-	0.00	$ -
628.7020	Inlet Protection Type D	EACH	3	$ 110.00	$ 330.00	-	-	-	0.00	$ -
690.0150	Sawing Asphalt	LF	80	$ 1.39	$ 111.20	-	-	-	0.00	$ -
SPV.0060.01	Adjusting Valve Boxes	EACH	1	$ 550.00	$ 550.00	-	-	-	0.00	$ -
SPV.0060.02	Sanitary Manhole Frame and Cover (R-1580 Neenah)	EACH	3	$ 900.00	$ 2,700.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 6,500.00	$ 6,500.00	-	-	-	0.00	$ -
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	585	$ 8.00	$ 4,680.00	-	-	-	0.00	$ -
	LAKEWOOD DR (ORCHARD TO EVERGREEN) SUBTOTAL				$ 53,305.95			PAID TO DATE		$ -
	SUBTOTAL $ PER ESTIMATE - LAKEWOOD DR (ORCHARD TO EVERGREEN)					$ -	$ -	$ -		

EDGEWOOD DR

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface - FULL DEPTH	SY	320	$ 15.05	$ 4,816.00	-	320.00	-	320.00	$ 4,816.00
204.0150	Removing Curb & Gutter	LF	15	$ 100.00	$ 1,500.00	-	15.00	-	15.00	$ 1,500.00
205.0100	Excavation Common - EBS (Undistributed)	CY	215	$ 26.85	$ 5,772.75	-	11.00	-	11.00	$ 295.35
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	215	$ 28.28	$ 6,080.20	-	21.14	-	21.14	$ 597.84
311.0110	Breaker Run (3" Crushed Allowed) - EBS (Undistributed)	TON	215	$ 29.00	$ 6,235.00	-	-	-	0.00	$ -
460.5223	HMA Pavement Type 3 LT 58-28 S	TON	42	$ 145.00	$ 6,090.00	-	54.13	-	54.13	$ 7,848.85
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	33	$ 165.00	$ 5,445.00	-	21.90	-	21.90	$ 3,613.50
601.0407	Concrete Curb & Gutter 18-Inch Type D	LF	125	$ 52.50	$ 6,562.50	-	126.00	-	126.00	$ 6,615.00
606.0100	Riprap Light	CY	10	$ 75.00	$ 750.00	-	-	-	0.00	$ -
611.8110	Adjusting Manhole Covers	EACH	2	$ 550.00	$ 1,100.00	-	-	-	0.00	$ -
628.7020	Inlet Protection Type D	EACH	2	$ 110.00	$ 220.00	-	2.00	-	2.00	$ 220.00
690.0150	Sawing Asphalt	LF	90	$ 1.39	$ 125.10	-	85.00	-	85.00	$ 118.15
690.0250	Sawing Concrete	LF	6	$ 2.10	$ 12.60	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 5,500.00	$ 5,500.00	-	-	0.75	0.75	$ 4,125.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	40	$ 35.00	$ 1,400.00	-	-	-	0.00	$ -
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	310	$ 7.50	$ 2,325.00	-	-	-	0.00	$ -
	EDGEWOOD DR SUBTOTAL			$	53,934.15			PAID TO DATE		**$ 29,749.69**
	SUBTOTAL $ PER ESTIMATE - EDGEWOOD DR					$ -	$ 25,624.69	$ 4,125.00		

ALLEY NS GEORGE WE TOLMAN-MADISON

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0100	Removing Concrete Pavement (Driveways)	SY	11	$ 27.50	$ 302.50	-	10.11	-	10.11	$ 278.03
204.0110	Removing Asphaltic Surface - FULL DEPTH	SY	495	$ 13.00	$ 6,435.00	-	-	-	0.00	$ -
204.0150	Removing Curb & Gutter	LF	30	$ 11.50	$ 345.00	-	26.40	-	26.40	$ 303.60
204.0155	Removing Concrete Sidewalk	SY	15	$ 27.50	$ 412.50	-	16.00	-	16.00	$ 440.00
205.0100	Excavation Common	CY	70	$ 28.00	$ 1,960.00	-	-	-	0.00	$ -
205.0100	Excavation Common - EBS (Undistributed)	CY	80	$ 30.50	$ 2,440.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch	TON	8	$ 56.25	$ 450.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	170	$ 28.65	$ 4,870.50	-	-	-	0.00	$ -
460.5223	HMA Pavement Type 3 LT 58-28 S	TON	66	$ 115.00	$ 7,590.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	51	$ 125.00	$ 6,375.00	-	-	-	0.00	$ -
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	30	$ 90.00	$ 2,700.00	-	26.40	-	26.40	$ 2,376.00
602.0415	Concrete Sidewalk 6-Inch	SF	125	$ 9.80	$ 1,225.00	-	144.00	-	144.00	$ 1,411.20
690.0150	Sawing Asphalt	LF	185	$ 1.39	$ 257.15	-	37.00	-	37.00	$ 51.43
690.0250	Sawing Concrete	LF	15	$ 2.10	$ 31.50	-		-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 4,800.00	$ 4,800.00	-	0.50	-	0.50	$ 2,400.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	50	$ 35.00	$ 1,750.00	-	-	-	0.00	$ -
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	245	$ 7.50	$ 1,837.50	-	-	-	0.00	$ -
	ALLEY NS GEORGE WE TOLMAN-MADISON SUBTOTAL			$	43,781.65			PAID TO DATE		**$ 7,260.26**
	SUBTOTAL $ PER ESTIMATE - ALLEY NS GEORGE WE TOLMAN-MADISON					$ -	$ 7,260.26	$ -		

ALLEY WE BROAD-CENTER NS GENEVA-MAIN

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface - FULL DEPTH	SY	650	$ 12.50	$ 8,125.00	-	-	-	0.00	$ -
204.0100	Removing Concrete Pavement (Driveways)	SY	17	$ 27.50	$ 467.50	-	-	-	0.00	$ -
204.0150	Removing Curb & Gutter	LF	215	$ 11.50	$ 2,472.50	-	-	-	0.00	$ -
204.0155	Remove Concrete Sidewalk	SY	20	$ 27.50	$ 550.00	-	-	-	0.00	$ -
205.0100	Excavation Common	CY	40	$ 50.00	$ 2,000.00	-	-	-	0.00	$ -
205.0100	Excavation Common - EBS (Undistributed)	CY	215	$ 30.00	$ 6,450.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	225	$ 28.25	$ 6,356.25	-	-	-	0.00	$ -
311.0110	Breaker Run (3" Crushed Allowed) - EBS (Undistributed)	TON	225	$ 30.00	$ 6,750.00	-	-	-	0.00	$ -
460.5223	HMA Pavement Type 3 LT 58-28 S	TON	90	$ 110.00	$ 9,900.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	70	$ 120.00	$ 8,400.00	-	-	-	0.00	$ -
601.0110	Concrete Curb Type D	LF	20	$ 67.00	$ 1,340.00	-	-	-	0.00	$ -
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	175	$ 53.00	$ 9,275.00	-	-	-	0.00	$ -
602.0415	Concrete Sidewalk 6-Inch	SF	175	$ 9.80	$ 1,715.00	-	-	-	0.00	$ -
602.0820	Concrete Driveway 8-Inch	SY	17	$ 82.90	$ 1,409.30	-	-	-	0.00	$ -
611.8110	Adjusting Manhole Covers	EACH	1	$ 550.00	$ 550.00	-	-	-	0.00	$ -
611.8115	Adjusting Inlet Covers	EACH	1	$ 600.00	$ 600.00	-	-	-	0.00	$ -
627.0200	Mulching	SY	15	$ 10.00	$ 150.00	-	-	-	0.00	$ -
628.7020	Inlet Protection Type D	EACH	2	$ 110.00	$ 220.00	-	-	-	0.00	$ -
690.0150	Sawing Asphalt	LF	250	$ 1.39	$ 347.50	-	-	-	0.00	$ -
690.0250	Sawing Concrete	LF	40	$ 2.10	$ 84.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 5,500.00	$ 5,500.00	-	-	0.50	0.50	$ 2,750.00
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	325	$ 7.50	$ 2,437.50	-	-	-	0.00	$ -
	ALLEY WE BROAD-CENTER NS GENEVA-MAIN SUBTOTAL			$	75,099.55			PAID TO DATE		**$ 2,750.00**
	SUBTOTAL $ PER ESTIMATE - ALLEY WE BROAD-CENTER NS GENEVA-MAIN					$ -	$ -	$ 2,750.00		

ALLEY WE CENTER-MILL NS GENEVA-MAIN

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface - FULL DEPTH	SY	805	$ 12.50	$ 10,062.50	-	-	-	0.00	$ -
204.0150	Removing Curb & Gutter	LF	35	$ 11.50	$ 402.50	-	-	-	0.00	$ -
204.0155	Remove Concrete Sidewalk	SY	10	$ 27.50	$ 275.00	-	-	-	0.00	$ -
205.0100	Excavation Common	CY	30	$ 35.00	$ 1,050.00	-	-	-	0.00	$ -
205.0100	Excavation Common - EBS (Undistributed)	CY	540	$ 28.00	$ 15,120.00	-	-	-	0.00	$ -
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	540	$ 28.50	$ 15,390.00	-	-	-	0.00	$ -
311.0110	Breaker Run (3" Crushed Allowed) - EBS (Undistributed)	TON	540	$ 29.50	$ 15,930.00	-	-	-	0.00	$ -
460.5223	HMA Pavement Type 3 LT 58-28 S	TON	110	$ 110.00	$ 12,100.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605).	TON	86	$ 115.00	$ 9,890.00	-	-	-	0.00	$ -
601.0407	Concrete Curb & Gutter 18-Inch Type D	LF	100	$ 53.00	$ 5,300.00	-	-	-	0.00	$ -
601.0600	Concrete Curb Pedestrian	LF	15	$ 50.00	$ 750.00	-	-	-	0.00	$ -
602.0415	Concrete Sidewalk 6-Inch	SF	76	$ 9.80	$ 744.80	-	-	-	0.00	$ -
611.8110	Adjusting Manhole Covers	EACH	1	$ 500.00	$ 500.00	-	-	-	0.00	$ -
611.8115	Adjusting Inlet Covers	EACH	1	$ 750.00	$ 750.00	-	-	-	0.00	$ -
628.7020	Inlet Protection Type D	EACH	2	$ 110.00	$ 220.00	-	-	-	0.00	$ -
690.0150	Sawing Asphalt	LF	460	$ 1.39	$ 639.40	-	-	-	0.00	$ -
690.0250	Sawing Concrete	LF	40	$ 2.10	$ 84.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 5,500.00	$ 5,500.00	-	-	0.50	0.50	$ 2,750.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	30	$ 35.00	$ 1,050.00	-	-	-	0.00	$ -
SPV.0180.02	Geotextile NX750 (Undistributed)	SY	400	$ 8.00	$ 3,200.00	-	-	-	0.00	$ -
	ALLEY WE CENTER-MILL NS GENEVA-MAIN SUBTOTAL			$	98,958.20			PAID TO DATE		**$ 2,750.00**
	SUBTOTAL $ PER ESTIMATE - ALLEY WE CENTER-MILL NS GENEVA-MAIN					$ -	$ -	$ 2,750.00		

SOUTH AND WELLS ST CROSSINGS

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface (FULL DEPTH)	SY	210	$ 19.50	$ 4,095.00	-	210.00	-	210.00	$ 4,095.00
204.0150	Removing Concrete Curb & Gutter	LF	165	$ 11.50	$ 1,897.50	-	263.00	-	263.00	$ 3,024.50
204.0155	Removing Concrete Sidewalk	SY	56	$ 27.50	$ 1,540.00	-	56.00	-	56.00	$ 1,540.00
205.0100	Excavation Common	CY	50	$ 28.00	$ 1,400.00	-	115.00	20.00	135.00	$ 3,780.00
305.0120	Base Aggregate Dense 1 1/4-Inch - EBS (Undistributed)	TON	50	$ 29.00	$ 1,450.00	-	64.00	11.73	75.73	$ 2,196.17
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605)	TON	28	$ 225.00	$ 6,300.00	-	32.00	-	32.00	$ 7,200.00
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	170	$ 55.00	$ 9,350.00	-	178.00	-	178.00	$ 9,790.00
602.0405	Concrete Sidewalk 4-Inch	SF	2680	$ 8.65	$ 23,182.00	-	2,770.00	-	2770.00	$ 23,960.50
602.0505	Curb Ramp Detectable Warning Field Yellow	SF	100	$ 50.00	$ 5,000.00	-	100.00	-	100.00	$ 5,000.00
628.1504	Silt Fence	LF	560	$ 5.00	$ 2,800.00	-	560.00	-	560.00	$ 2,800.00
646.6120	Marking Stop Line Epoxy 18-Inch	LF	60	$ 18.00	$ 1,080.00	-	-	84.00	84.00	$ 1,512.00
646.7420	Marking Crosswalk Epoxy Transverse Line 6-Inch	LF	300	$ 13.00	$ 3,900.00	-	-	430.00	430.00	$ 5,590.00
646.9000	Marking Removal Line (Stop line & Pedestrian)	LF	430	$ 4.50	$ 1,935.00	-	-	430.00	430.00	$ 1,935.00
690.0150	Sawing Asphalt	LF	310	$ 1.39	$ 430.90	-	352.00	-	352.00	$ 489.28
690.0250	Sawing Concrete	LF	40	$ 2.10	$ 84.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 5,000.00	$ 5,000.00	-	1.00	-	1.00	$ 5,000.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	475	$ 25.00	$ 11,875.00	-	-	350.00	350.00	$ 8,750.00
	SOUTH AND WELLS ST CROSSINGS SUBTOTAL			$	81,319.40			PAID TO DATE		**$ 86,662.45**
	SUBTOTAL $ PER ESTIMATE - SOUTH AND WELLS ST CROSSINGS					$ -	$ 67,975.28	$ 18,687.17		

S LAKE SHORE DRIVE (TOWN OF LYNN)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
646.2020	Marking Line Epoxy 6-Inch (White)	LF	2180	$ 1.00	$ 2,180.00	2,042.00	-	-	2042.00	$ 2,042.00
646.2020	Marking Line Epoxy 6-Inch (Double Yellow)	LF	2190	$ 1.00	$ 2,190.00	2,164.00	-	-	2164.00	$ 2,164.00
646.7520	Marking Crosswalk Epoxy Block Style 24-Inch (White)	LF	200	$ 23.00	$ 4,600.00	100.00	-	-	100.00	$ 2,300.00
SPV.0180.03	Seal Coating	SY	5200	$ 3.00	$ 15,600.00	5,108.00	-	-	5108.00	$ 15,324.00
	S LAKE SHORE DRIVE (TOWN OF LYNN) SUBTOTAL			$	24,570.00			PAID TO DATE		**$ 21,830.00**
	SUBTOTAL $ PER ESTIMATE - S LAKE SHORE DRIVE (TOWN OF LYNN)					$ 21,830.00	$ -	$ -		

S LAKE SHORE DRIVE (CITY OF LAKE GENEVA)

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
646.2020	Marking Line Epoxy 6-Inch (White)	LF	4330	$ 1.00	$ 4,330.00	4,400.00	-	-	4400.00	$ 4,400.00
646.2020	Marking Line Epoxy 6-Inch (Double Yellow)	LF	4170	$ 1.00	$ 4,170.00	4,156.00	-	-	4156.00	$ 4,156.00
646.7520	Marking Crosswalk Epoxy Block Style 24-Inch (White)	LF	200	$ 23.00	$ 4,600.00	220.00	-	-	220.00	$ 5,060.00
SPV.0180.03	Seal Coating	SY	9800	$ 3.00	$ 29,400.00	9,489.00	-	-	9489.00	$ 28,467.00
	S LAKE SHORE DRIVE (CITY OF LAKE GENEVA) SUBTOTAL			$	42,500.00			PAID TO DATE		**$ 42,083.00**
	SUBTOTAL $ PER ESTIMATE - S LAKE SHORE DRIVE (CITY OF LAKE GENEVA)					$ 42,083.00	$ -	$ -		

UTILITY COMMISSION LOT

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
646.1020	Marking Line Epoxy 4-Inch (Yellow)	LF	810	$ 4.50	$ 3,645.00	723.00	-	-	723.00	$ 3,253.50
646.2020	Marking Line Epoxy 6-Inch (White)	LF	78	$ 11.00	$ 858.00	80.00	-	-	80.00	$ 880.00
646.5020	Marking Arrow Epoxy (White)	EACH	5	$ 250.00	$ 1,250.00	5.00	-	-	5.00	$ 1,250.00
646.5220	Marking Symbol Epoxy, ADA Accessible (Yellow)	EACH	2	$ 175.00	$ 350.00	1.00	-	-	1.00	$ 175.00
646.6120	Marking Stop Line Epoxy 18-Inch (White)	LF	14	$ 18.00	$ 252.00	12.00	-	-	12.00	$ 216.00
SPV.0180.03	Seal Coating	SY	2800	$ 10.00	$ 28,000.00	2,757.00	-	-	2757.00	$ 27,570.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	570	$ 25.00	$ 14,250.00	-	-	-	0.00	$ -
	UTILITY COMMISSION LOT SUBTOTAL			$	48,605.00			PAID TO DATE		**$ 33,344.50**
	SUBTOTAL $ PER ESTIMATE - UTILITY COMMISSION LOT					$ 33,344.50	$ -	$ -		

ADDITIONAL BID 1, SW CORNER WELLS/SOUTH PEDESTRIAN IMPROVEMENTS

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface (FULL DEPTH)	SY	140	$ 35.00	$ 4,900.00	-	140.00	-	140.00	$ 4,900.00
204.0150	Removing Concrete Curb & Gutter	LF	40	$ 11.50	$ 460.00	-	40.00	-	40.00	$ 460.00
204.0155	Removing Concrete SideWalk	SY	15	$ 27.50	$ 412.50	-	15.00	-	15.00	$ 412.50
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605)	TON	27	$ 205.00	$ 5,535.00	-	49.10	-	49.10	$ 10,065.50
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	125	$ 51.00	$ 6,375.00	-	125.00	-	125.00	$ 6,375.00
602.0405	Concrete Sidewalk 4-Inch	SF	90	$ 8.65	$ 778.50	-	90.00	-	90.00	$ 778.50
602.0505	Curb Ramp Detectable Warning Field Yellow	SF	20	$ 50.00	$ 1,000.00	-	20.00	-	20.00	$ 1,000.00
628.1504	Silt Fence	LF	115	$ 50.00	$ 5,750.00	-	115.00	-	115.00	$ 5,750.00
646.1020	Marking Line Epoxy 4-Inch (Yellow)	LF	15	$ 6.00	$ 90.00	-	-	20.00	20.00	$ 120.00
646.6120	Marking Stop Line Epoxy 18-Inch	LF	30	$ 24.00	$ 720.00	-	-	12.00	12.00	$ 288.00
646.7420	Marking Crosswalk Epoxy Transverse Line 6-Inch	LF	115	$ 20.00	$ 2,300.00	-	-	-	0.00	$ -
646.9000	Marking Removal Line (Stop line & Pedestrian)	LF	120	$ 9.00	$ 1,080.00	-	-	120.00	120.00	$ 1,080.00
690.0150	Sawing Asphalt	LF	230	$ 1.39	$ 319.70	-	565.00	-	565.00	$ 785.35
690.0250	Sawing Concrete	LF	15	$ 2.10	$ 31.50	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 5,000.00	$ 5,000.00	-	1.00	-	1.00	$ 5,000.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	90	$ 35.00	$ 3,150.00	-	-	100.00	100.00	$ 3,500.00
	ADDITIONAL BID 1, SW CORNER WELLS/SOUTH PEDESTRIAN			$	37,902.20			PAID TO DATE		**$ 40,514.85**
	SUBTOTAL $ PER ESTIMATE - ADDITIONAL BID 1, SW CORNER WELLS/SOUTH PEDESTRIAN IMPROVEMENTS					$ -	$ 35,526.85	$ 4,988.00		

ADDITIONAL BID 2, GRADING ALONG S LAKE SHORE DRIVE

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
205.0100	Excavation Common	CY	40	$ 55.00	$ 2,200.00	-	-	-	0.00	$ -
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	300	$ 35.00	$ 10,500.00	-	-	-	0.00	$ -
	ADDITIONAL BID 2, GRADING ALONG S LAKE SHORE DRIVE SUBTOTAL			$	12,700.00			PAID TO DATE		**$ -**

ADDITIONAL BID 3, PATCHES

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface (FULL DEPTH)	SY	350	$ 20.00	$ 7,000.00	-	226.00	-	226.00	$ 4,520.00
204.0150	Removing Concrete Curb & Gutter	LF	20	$ 50.00	$ 1,000.00	-	-	-	0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605)	TON	85	$ 175.00	$ 14,875.00	-	77.10	-	77.10	$ 13,492.50
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	20	$ 123.00	$ 2,460.00	-	-	-	0.00	$ -
690.0150	Sawing Asphalt	LF	600	$ 1.39	$ 834.00	-	68.00	-	68.00	$ 94.52
690.0250	Sawing Concrete	LF	15	$ 2.10	$ 31.50	-	-	-	0.00	$ -
	ADDITIONAL BID 3, PATCHES SUBTOTAL			$	26,200.50			PAID TO DATE		**$ 18,107.02**
	SUBTOTAL $ PER ESTIMATE - ADDITIONAL BID 3, PATCHES					$ -	$ 18,107.02	$ -		

ADDITIONAL BID 4, WELLS/SCHOOL PEDESTRIAN IMPROVEMENTS

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
204.0110	Removing Asphaltic Surface (FULL DEPTH)	SY	220	$ 30.00	$ 6,600.00	-	220.00	100.00	320.00	$ 9,600.00
204.0150	Removing Concrete Curb & Gutter	LF	215	$ 11.50	$ 2,472.50	-	229.00		229.00	$ 2,633.50
204.0155	Removing Concrete SideWalk	SY	50	$ 27.50	$ 1,375.00	-	50.00	-	50.00	$ 1,375.00
460.5223	HMA Pavement Type 3 LT 58-28 S.	TON	10	$ 283.00	$ 2,830.00	-	-		0.00	$ -
460.5224	HMA Pavement Type 4 LT 58-28 S. Item also includes tack coat (455.0605)	TON	24	$ 195.00	$ 4,680.00	-	0.18	22.23	22.41	$ 4,369.95
601.0411	Concrete Curb & Gutter 30-Inch Type D	LF	240	$ 53.00	$ 12,720.00	-	229.00		229.00	$ 12,137.00
602.0405	Concrete Sidewalk 4-Inch	SF	1255	$ 8.65	$ 10,855.75	-	916.30	-	916.30	$ 7,926.00
602.0505	Curb Ramp Detectable Warning Field Yellow	SF	100	$ 50.00	$ 5,000.00	-	72.00	-	72.00	$ 3,600.00
628.1504	Silt Fence	LF	240	$ 5.00	$ 1,200.00	-	240.00	-	240.00	$ 1,200.00
637.2230	Signs Type II Reflective F	SF	44	$ 40.00	$ 1,760.00	-	-		0.00	$ -
646.7420	Marking Crosswalk Epoxy Transverse Line 6-Inch	LF	180	$ 12.00	$ 2,160.00	-	-	190.00	190.00	$ 2,280.00
646.7520	Marking Crosswalk Epoxy Block Style 24-Inch	LF	105	$ 24.00	$ 2,520.00	-	-	130.00	130.00	$ 3,120.00
646.9000	Marking Removal Line (Stop line & Pedestrian)	LF	360	$ 4.75	$ 1,710.00	-	-	360.00	360.00	$ 1,710.00
690.0150	Sawing Asphalt	LF	305	$ 1.39	$ 423.95	-	467.00	-	467.00	$ 649.13
690.0250	Sawing Concrete	LF	20	$ 2.10	$ 42.00	-	-	-	0.00	$ -
SPV.0060.03	Sign Post V-LOC Sign Support & Square Post	EA	4	$ 295.00	$ 1,180.00	-	-	-	0.00	$ -
SPV.0105.01	Traffic Control	LS	1	$ 4,500.00	$ 4,500.00	-	1.00	-	1.00	$ 4,500.00
SPV.0180.01	Restore Disturbed Areas - Includes Topsoil (625.0100), Fertilizer Type A (629.0205), Seeding Mix No. 40 (630.0140).	SY	350	$ 25.00	$ 8,750.00	-	-	150.00	150.00	$ 3,750.00
	ADDITIONAL BID 4, WELLS/SCHOOL PEDESTRIAN IMPROVEMENTS			$	70,779.20		PAID TO DATE		$	**58,850.58**
	SUBTOTAL $ PER ESTIMATE - ADDITIONAL BID 4, WELLS/SCHOOL PEDESTRIAN IMPROVEMENTS					$ -	$ 40,655.73	$ 18,194.85		

CCO1

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
CCO1.1	Concrete Curb & Gutter 18-Inch	LF	85	$ 58.00	$ 4,930.00	-	85.00	-	85.00	$ 4,930.00
CCO1.2	R1-1 Stop Sign Traffic Flashing Beacon System, Solar	EA	4	$ 4,300.00	$ 17,200.00	-	-	-	0.00	$ -
	CCO1 SUBTOTAL			$	22,130.00		PAID TO DATE		$	**4,930.00**
	SUBTOTAL $ PER ESTIMATE - CCO1					$ -	$ 4,930.00	$ -		

CCO2

Item No.	Item Description	Unit	Bid Qty.	Bid Unit Price	Bid Total Price	Quantities per Estimate #1	#2	#3	Qty to Date	$ Paid to Date
CCO2.1	Locate Gas Line Using Vac Truck	HR	1	$ 395.00	$ 395.00	-	1.00	-	1.00	$ 395.00
	CCO2 SUBTOTAL			$	395.00		PAID TO DATE		$	**395.00**
	SUBTOTAL $ PER ESTIMATE - CCO2					$ -	$ 395.00	$ -		

	Subtotal $ per Estimate	$ 97,257.50	$ 200,474.82	$ 51,495.02
	Retainage per Estimate	$ (4,862.88)	$ (10,023.74)	$ (2,574.75)
	Total Paid per Estimate	$ 92,394.62	$ 190,451.08	$ 48,920.27

TOTAL - BASE BID	**$ 846,152.20**	**TOTAL - Paid to Date**	**$ 349,227.34**
		Less Retainage Held	**$ (17,461.37)**
		TOTAL - Paid to Date, Less Retainage	**$ 331,765.97**

ORDINANCE OF THE COMMON COUNCIL			
An ordinance amending sub-section (3) Personnel Committee of Section 2-49, Personnel Committee, of Article II, City Council, of Chapter 2, Administration of the City of Lake Geneva Municipal Code of the City of Lake Geneva, clarifying responsibilities of the City Administrator and the Personnel Committee.			
Committee	Personnel Committee and Finance, License, and Regulation Committee		
Fiscal Impact	N/A		
File Number	**25-15**	**First Reading** **Second Reading**	October ____, 2025 October ____, 2025

The Common Council of the City of Lake Geneva, Wisconsin, does hereby ordain that sub-section (3) Personnel Committee of Section 2-49, Personnel Committee, of Article II, City Council, of Chapter 2, Administration of the City of Lake Geneva Municipal Code of the City of Lake Geneva is amended to read as follows:

Section 2-49 (3) Personnel Committee.

a. The Committee shall be responsible for overseeing the negotiations of all employment contracts, agreements, or hire letters between the City of Lake Geneva and its Department Heads, excepting only those employees who are specifically governed by another City board or commission. The Committee shall delegate the negotiations of all exempt and nonexempt employment contracts, agreements, or hire letters to the City Administrator.

b. The Committee shall make formal recommendations to the City Council to approve or reject proposed contracts or employment agreements. The City Council retains final authority to approve or reject such agreements by majority vote.

c. The Committee shall establish a review process and timeline for a semiannual and/or annual performance evaluation of the City Administrator. The City Administrator shall conduct semiannual and/or annual performance evaluations of City Department Heads, excluding those governed by another City board, commission, or an elected official. Evaluations shall focus on leadership effectiveness, adherence to City goals, policy implementation, and fiscal management.

d. The Committee shall act in an oversight capacity for disciplinary actions involving Department Heads, and for matters escalated beyond internal departmental resolution such as grievances, prohibitive practice complaints, or termination recommendations. The City Administrator and Department Heads retain operational authority to address day-to-day personnel issues within the bounds of City policy and the Employee Handbook including all disciplinary actions and terminations.

e. The Committee shall review and recommend job descriptions for all exempt City positions (excluding Police, Fire, Library, and Utility employees), for approval by the City Council. The City Administrator and Department Heads shall establish new or modified job descriptions for all non-exempt positions based on operational needs. Job descriptions shall be utilized when advertising for and evaluating potential new and current employees. All job descriptions shall be available for review by the Committee or City Council when requested.

f. The Committee will interview and recommend Department Head employee candidates and all positions that are appointed by the City Council as set forth in Section 2-3 of the Municipal Code of the City of Lake Geneva.

g. Upon recommendation of the Committee and approval by the City Council, the City Administrator and Department Heads shall implement and adhere to personnel policies, compensation structures, job descriptions, and procedures approved by the City Council. City Department Heads are those individuals responsible for the management of particular functions and employees of the City. Department Heads shall be given the authority to hire and terminate employees within their department, provided that any hiring is done without violating budgetary constraints placed on their departments and any terminating is done within the guidelines established by the City of Lake Geneva.

h. The City Administrator shall provide periodic reports to the Personnel Committee on hiring, promotions, evaluations, disciplinary actions, and staffing levels, to ensure alignment with policy and budgetary expectations.

Approved by the City of Lake Geneva Common Council on this _____ day of October 2025.

Council Action: ☐ **Adopted** ☐ **Failed** **Vote**

Mayoral Action: ☐ **Accept** ☐ **Veto**

_____

Todd Krause, Mayor Date

Attest:

_____

Lacey L. Reynolds, City Clerk Date

ORDINANCE OF THE COMMON COUNCIL			
An ordinance amending sub-section (3) Personnel Committee of Section 2-49, Personnel Committee, of Article II, City Council, of Chapter 2, Administration of the City of Lake Geneva Municipal Code of the City of Lake Geneva, clarifying responsibilities of the City Administrator and the Personnel Committee.			
Committee	Personnel Committee and Finance, License, and Regulation Committee		
Fiscal Impact	N/A		
File Number	**25-15**	**First Reading** **Second Reading**	October ____, 2025 October ____, 2025

The Common Council of the City of Lake Geneva, Wisconsin, does hereby ordain that sub-section (3) Personnel Committee of Section 2-49, Personnel Committee, of Article II, City Council, of Chapter 2, Administration of the City of Lake Geneva Municipal Code of the City of Lake Geneva is amended to read as follows:

Section 2-49 (3) Personnel Committee.

a. The Committee shall be responsible for overseeing the negotiations of all employment contracts, agreements, or hire letters between the City of Lake Geneva and its Department Heads, excepting only those employees who are specifically governed by another City ~~committee~~ board or commission. The Committee shall delegate the negotiations of all exempt and nonexempt employment contracts, agreements, or hire letters to the City Administrator.

~~The Committee shall be responsible for negotiating all employment contracts or agreements between the City of Lake Geneva and its employees, excepting only those employees who are specifically governed by another City committee or commission.~~

b. The Committee shall make formal recommendations to the City Council to approve or reject proposed contracts or employment agreements. The City Council retains final authority to approve or reject such agreements by majority vote.

~~The Committee shall make a recommendation to the City Council to accept or reject employee contract or agreement offers. The City Council shall have the sole power to accept or reject employee contracts or agreements by a majority vote.~~

c. The Committee shall establish a review process and timeline for a semiannual and/or annual performance evaluation of the City Administrator. The City Administrator shall conduct

semiannual and/or annual performance evaluations of City Department Heads, excluding those governed by another City ~~committee,~~ board, commission, or an elected official. Evaluations shall focus on leadership effectiveness, adherence to City goals, policy implementation, and fiscal management.

~~The Committee shall be responsible for periodic evaluations, semiannual and/or annual, of all City department heads except those governed by another City commission, committee, or official.~~

d. The Committee shall act in an oversight capacity for disciplinary actions involving D~~d~~epartment H~~h~~eads ~~and~~ ~~exempt employees~~, and for matters escalated beyond internal departmental resolution such as grievances, prohibitive practice complaints, or termination recommendations. The City Administrator and Department Heads retain operational authority to address day-to-day personnel issues within the bounds of City policy and the Employee Handbook including all disciplinary actions ~~including~~ and terminations.

~~The Committee shall be responsible for all disciplinary matters involving grievances, prohibitive practice complaints, work rule violations, contract violations, and other matters including discharge or separation for employment.~~

e. The Committee shall review and recommend job descriptions for all exempt City positions (excluding Police, ~~and~~ Fire, Library, and Utility employees), for approval by the City Council. The City Administrator and Department Heads shall establish new or modified job descriptions for all non-exempt positions based on operational needs. Job descriptions shall be utilized when advertising for and evaluating potential new and current employees. All job descriptions shall be available for review by the Committee or City Council when requested.

~~The Committee shall be responsible for creating and recommending to the City Council job descriptions for all City employees (except police and fire), and such job descriptions shall be utilized when advertising for and evaluating potential new and current employees.~~

f. The Committee will interview and recommend ~~exempt~~ Department Head employee candidates and all positions that are appointed by the City Council as set forth in Section 2-3 of the Municipal Code of the City of Lake Geneva.

~~The Committee will interview all prospective exempt employees and all appointed officials of the City that are appointed by the City Council as set forth in Section 2-3 of the Municipal Code of the City of Lake Geneva. City department heads are those individuals responsible for the oversight of particular functions and employees of the City. City department heads shall be~~

~~given the authority to hire and terminate employees within their department, provided that any hiring is done without violating budgetary constraints placed on their departments and any terminating is done within the guidelines established by the City of Lake Geneva Employee Handbook.~~

g. Upon recommendation of the Committee and ~~approved~~ approval by the City Council, the City Administrator and Department Heads shall implement and adhere to personnel policies, compensation structures, job descriptions, and procedures approved by the City Council. City Ddepartment Hheads are those individuals responsible for the management of particular functions and employees of the City. Department Heads shall be given the authority to hire and terminate employees within their department, provided that any hiring is done without violating budgetary constraints placed on their departments and any terminating is done within the guidelines established by the City of Lake Geneva.

h. The City Administrator shall provide periodic reports to the Personnel Committee on hiring, promotions, evaluations, disciplinary actions, and staffing levels, to ensure alignment with policy and budgetary expectations.

Approved by the City of Lake Geneva Common Council on this _____ day of October 2025.

Council Action: ☐ **Adopted** ☐ **Failed** **Vote** _____

Mayoral Action: ☐ **Accept** ☐ **Veto**

_____

Todd Krause, Mayor Date

Attest:

_____

Lacey L. Reynolds, City Clerk Date

MEMORANDUM

TO: Finance License and Regulation Committee, Mayor, City Administrator, City Clerk, Director of Public Works

FROM: City Attorney, Daniel S. Draper

DATE: October 3, 2025

RE: Bids for Rapid Flashing Beacons at School Crossing (Between Badger High School and Lake Geneva Middle School

There were two bids received for the above-described construction project. Bidder No. 1, Forward Traffic & Marking, LLC submitted a bid for $14,785.00. Bidder No. 2, Property Solutions Contracting LLC submitted a bid for $19,400.00. The city engineer and city staff recommend that both bids be rejected. There was a required change in the design of the ramps in the project because there was a gas line between the high school and the middle school. The project now requires additional pedestals for the push buttons and a separate post for the sign flashers. The cost for these changes is $4,190, which exceeds 15% of the original project. Because the change order exceeds 15% of the project, Wisconsin public bidding laws require that the project be rebid.

Because the total cost of the project with the change order is less than $25,000.00, the project is not required to be publicly bid. Instead, a request for proposal (RFP) can be used rather than the public bidding process. Pursuant to §62.15, *Wis. Stats.,* the only requirement is that the city must publish a Class 1 Notice before the contract for the work is executed.

If you should have any questions, please do not hesitate to contact me.

1224 Pine Street
Burlington, WI 53105
T: 262.767.2747 • F: 414.351.4117

MEMORANDUM TO THE CITY OF LAKE GENEVA

To: Neil Waswo, Tom Earle

From: Bridget Barry

CC: Lacey Reynolds, Vanessa Jahns, Naomi Rauch

Date: October 3, 2025

Re: Recommendation for Rejection of Bids for Rapid Flashing Beacons at School Crossing

A total of two bids were received on Wednesday, August 13th, 2025, for the ***Rapid Flashing Beacons at School Crossing*** in the City of Lake Geneva***.*** The bids were reviewed, and the final bid tab results are as follows:

Item	**Bidder No. 1** **Forward Traffic & Marking, LLC (Madison, WI)**	Bidder No. 2 Property Solutions Contracting LLC (Thiensville, WI)
Total Bid	**$ 14,785.00**	$ 19,400.00

After conversation with City Staff, we recommend that the bids for the Rapid Flashing Beacons at the school crossing be rejected. The change in the design of the ramps due to the discovered gas line between the middle and high schools means that additional pedestals to put the push buttons on, and a separate post for the sign with flashers. This change order would exceed the allowable 15% of the project budget. Thus we are recommending the bids be rejected and the project be sent out as a Request for Proposal.

Memo

To: FLR Committee
From: David De Angelis, Administrator
Date: October 3, 2025
RE: Strategic Plan Contract

In your packet you will find the contract and a revised RFP. After the presentation we met with the consultant to discuss the service provided in the base contract price and the additional services offered. The contract and proposal you have in your packet reflects an additional $10,000 in services. These additional services are as follows:

- Specific roundtable with council and staff
- Focus groups with additional key stakeholders and schools
- Second Community survey regarding the preferred future and priority areas
- Final in person Council Presentation with final report

These items where selected after discussion with the contractor taking into account discussion and comments from the Council at the selection meeting. If the Committee does not want to modify the agreement we will revert to the original agreement and but with all of the recommended language changes from the original as requested by the City Attorney.

Please feel free to contact me if you have any questions.

Future iQ, Inc.

SERVICE PROVIDER/PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into as of this 1st day of October, 2025 by and between **Future iQ**, **Inc**, a Minnesota corporation, ("Future iQ – Service Provider"), and **City of Lake Geneva**("Client"), collectively, the Client and the Service Provider are referred to as (the "Parties)."

WITNESSETH:

- WHEREAS, the client desires to have certain services and tasks performed as set forth below requiring specialized skills and other supportive capabilities;
- WHEREAS, Future iQ represents that as the Service Provider is qualified and possesses sufficient skills and the necessary capabilities, including technical and professional expertise, where required, to perform the services and/or tasks set forth in this Agreement.
- NOW, THEREFORE, in consideration of the terms, conditions, covenants, and performance contained herein, the Parties hereto agree as follows:

1. SCOPE OF SERVICES.

The Service Provider shall perform such services and accomplish such tasks, as set forth in the "Scope of Services" attached hereto as "Exhibit A – Proposal".

The total fee for the Project shall not exceed USD $45,000.

2. TERM.

Work shall commence on the execution of this Agreement, and the term shall terminate on at the completion of the work, as outlined in the Proposal, or earlier, unless extended by mutual written agreement of the Parties.

3. COMPENSATION AND METHOD OF PAYMENT.

A. Payments for services provided hereunder shall follow the performance of such services, as set out in the Proposal, and with initial payment as noted.
B. The Service Provider shall submit to the Client or her designee an invoice for services rendered, and the initial payment. The Client shall make payment to the Service Provider within thirty (30) days thereafter.
C. The Service Provider reserves the right to suspend or terminate work and this Agreement if any unpaid account exceeds sixty (90) days.

4. SERVICE PROVIDER EMPLOYEE/AGENTS.

Future iQ may, by agreement, remove or change an employee(s), agent(s), or representative(s) from employment on this Project.

5. INSURANCE.

Future iQ as Service Provider, shall procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Service Provider, their agents, representatives, employees, or subcontractors. The Service Provider shall provide a Certificate of Insurance evidencing:

A. General Liability insurance written on an occurrence basis with limits no less than One Million Dollars ($1,000,000) per occurrence and Two Million Dollars ($2,000,000) aggregate for personal injury, bodily injury and property damage.
B. Automobile Liability insurance with limits no less than Two Million Dollars ($2,000,000) combined single limit per accident for bodily injury and property damage.
C. Professional Liability (Errors and Omissions) insurance (if applicable) with annual limits no less than One Million Dollars ($1,000,000) per occurrence.
D. Workers Compensation insurance limits written as follows: Bodily Injury by Accident Five Hundred Thousand Dollars ($500,000) each accident; Bodily Injury by Disease Five Hundred Thousand Dollars ($500,000) each employee, Five Hundred Thousand Dollar ($500,000) policy limit.
E. The Client shall be named as an additional insured on general liability and auto liability insurance policies, with respect to work performed by or on behalf of the Service Provider and a copy of the endorsement naming the Client as an additional insured shall be attached to the Certificate of Insurance. Should any of the above-described policies be cancelled before the expiration date thereof, Service Provider shall deliver notice to the Client within thirty (30) days of cancellation. The Client reserves the right to request certified copies of any required policies.
F. The Service Provider's insurance shall contain a clause stating that coverage shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

6. COMPLIANCE WITH LAWS AND WARRANTIES.

A. The Service Provider, in the performance of this Agreement, shall comply with all applicable federal, state, and local laws and ordinances, including regulations for licensing, certification and operation of facilities, programs and accreditation, and licensing of individuals, and any other standards or criteria as described in this Agreement to assure quality of services.

B. Service Provider shall be solely responsible to the Client for the quality of all services performed by its employees or sub-contractors under this Agreement. Service Provider hereby
C. warrants that the services performed by its employees or sub-contractors will be performed substantially in conformance with the standard of care observed by similarly situated companies providing services under similar conditions.

7. CHANGES.

Either party may request changes to the scope of services and performance to be provided hereunder, however, no change or addition to this Agreement shall be valid or binding upon either party unless such change or addition be in writing and signed by both Parties. Such amendments shall be attached to and made part of this Agreement.

9. TERMINATION.

Either party may terminate this Agreement, in whole or in part, at any time, by at least thirty (30) days' written notice to the other party. The Service Provider shall be paid its costs and work performed up to the time of termination. The Service Provider shall promptly submit a termination claim to the Client. If the Service Provider has any property in its possession belonging to the Client, the Service Provider will account for the same, and dispose of it in a manner directed by the Client.

10. ATTORNEYS FEES AND COSTS.

If any legal proceeding is brought for the enforcement of this Agreement, or because of a dispute, breach, default, or misrepresentation in connection with any of the provisions of this Agreement, the prevailing party shall be entitled to recover from the other party, in addition to any other relief to which such party may be entitled, reasonable attorney’s fees and other costs incurred in connection with that action or proceeding.

11. ENTIRE AGREEMENT.

The Parties agree that this Agreement is the complete expression of the terms hereto and any oral representations or understandings not incorporated herein are excluded. Further, any modification of this Agreement shall be in writing and signed by both Parties. Failure to comply with any of the provisions stated herein shall constitute material breach of contract and cause for termination.

Both Parties recognize time is of the essence in the performance of the provisions of this Agreement.

IN WITNESS WHEREOF the Parties hereto have caused this Agreement to be executed the day and year first hereinabove written.

Future iQ, Inc

_____
Signature

_____
David Beurle, Chief Executive Officer

City of Lake Geneva

_____
Signature

_____
David De Angelis, City Administrator

EXHIBIT A - PROPOSAL

CITY OF LAKE GENEVA, WISCONSIN
RFP FOR STRATEGIC PLANNING SERVICES

OCTOBER 1, 2025
REVISED PROPOSAL

STRATEGIC ACTION PLAN

future→iQ
Create Future Intelligence™

Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

October 1, 2025

David De Angelis
City Administrator
City of Lake Geneva
626 Geneva Street
Lake Geneva, WI 53147

Re: RFP for Strategic Planning Services

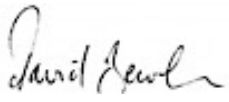
Dear Mr. De Angelis,

Future iQ is pleased to submit this proposal to serve as the consultant team to facilitate the development of the City of Lake Geneva's new five-year Strategic Action Plan.

Our project team delivers personal, innovative, and customized projects. Our hands-on approach, as well as the effectiveness of our methodology, will assist Lake Geneva's stakeholders to achieve an ambitious, realistic and actionable strategic plan. Our goal is to produce original insight, and an agreed-upon, defensible roadmap for the City's future. Future iQ has a strong track record of designing and implementing visioning and strategic planning projects across North America, Europe and Australia. We recently worked with the Cities of Traverse City in Michigan, and Sugar Land in Texas to complete their strategic planning process and are currently completing the development of the Strategic Roadmap for the City of Springfield, Ohio.

It would be our privilege to work with the City of Lake Geneva on this initiative. Please contact me for clarifications. Thank you for your consideration.

Yours sincerely,



David Beurle, CEO
Future iQ, Inc.
Tel: 612-757-9190
Email: david@future-iq.com

TABLE OF CONTENTS

1.0 RELEVANT CONTACT INFORMATION 1

2.0 DESCRIPTION OF THE FIRM 2

3.0 SUMMARY OF THE PROPOSAL 3

4.0 RECOMMENDED PLANNING ACTIVITIES AND ENGAGEMENT 4

4.1 Methodological Approach – Overview 4
4.2 Engagement Plan 5
4.3 Scenario-Based Think-Tank Methodology 8
4.4 Data Visualization 10
4.5 Project Portal and Communications 11

5.0 WORK PLAN & TIMELINE 12

5.1 Proposed Project Timeline 12
5.2 Work Plan Details 13
5.2.1 Phase 1: Initial Planning and Project Set-Up 13
5.2.2 Phase 2: Stakeholder Engagement 14
5.2.3 Phase 3: Plan Development 15

6.0 STAFFING PLAN 16

7.0 REFERENCES 17

8.0 EXAMPLES OF STRATEGIC PLANNING DOCUMENTS 18

8.1 Highlight Strategic Planning Projects 18
8.2 Additional Strategic Planning Projects 20

9.0 PROPOSED COST PROPOSAL 21

10.0 COMPLETE TEAM RESUMES 22

1.0 Relevant Contact Information

Primary Contact:

David Beurle
Chief Executive Officer
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9190
Email: david@future-iq.com
Website : www.future-iq.com

Secondary Contact:

Heather Branigin
Vice President, Foresight Research
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9121
Email: heather@future-iq.com
Website : www.future-iq.com

2.0 Description of the Firm

Future iQ is a small, privately owned global research and consulting company headquartered in Minneapolis, Minnesota. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to our clients. With nine staff members and four strategic partners, Future iQ's clients span North America, Europe, and Australia. Please click on the links in the Snapshot to explore Future iQ's specializations.

Snapshot of Future iQ

Expertise

- City and Urban Planning
- Organizational and Corporate Planning
- Regional Planning
- Tourism Destination Development
- Economic and Workforce Development
- Defense Sector Engagement
- Industry Planning and Analysis

Methodology

- Scenario-Based Strategic Planning and Visioning
- Stakeholder and Community Engagement
- Data Visualization
- Customized Foresight Research
- FutureiQ Mapper – Network & Supply Chain Mapping
- The Future Game
- Future iQ Creative

Foresight Research

- Cities of the Future
- Future of Urban Living
- The Future of Food
- Future of Tourism
- The Next Industrial Revolution
- Future of Manufacturing
- The Future of Wellbeing

For more information, please visit Future iQ's website at:
http://future-iq.com

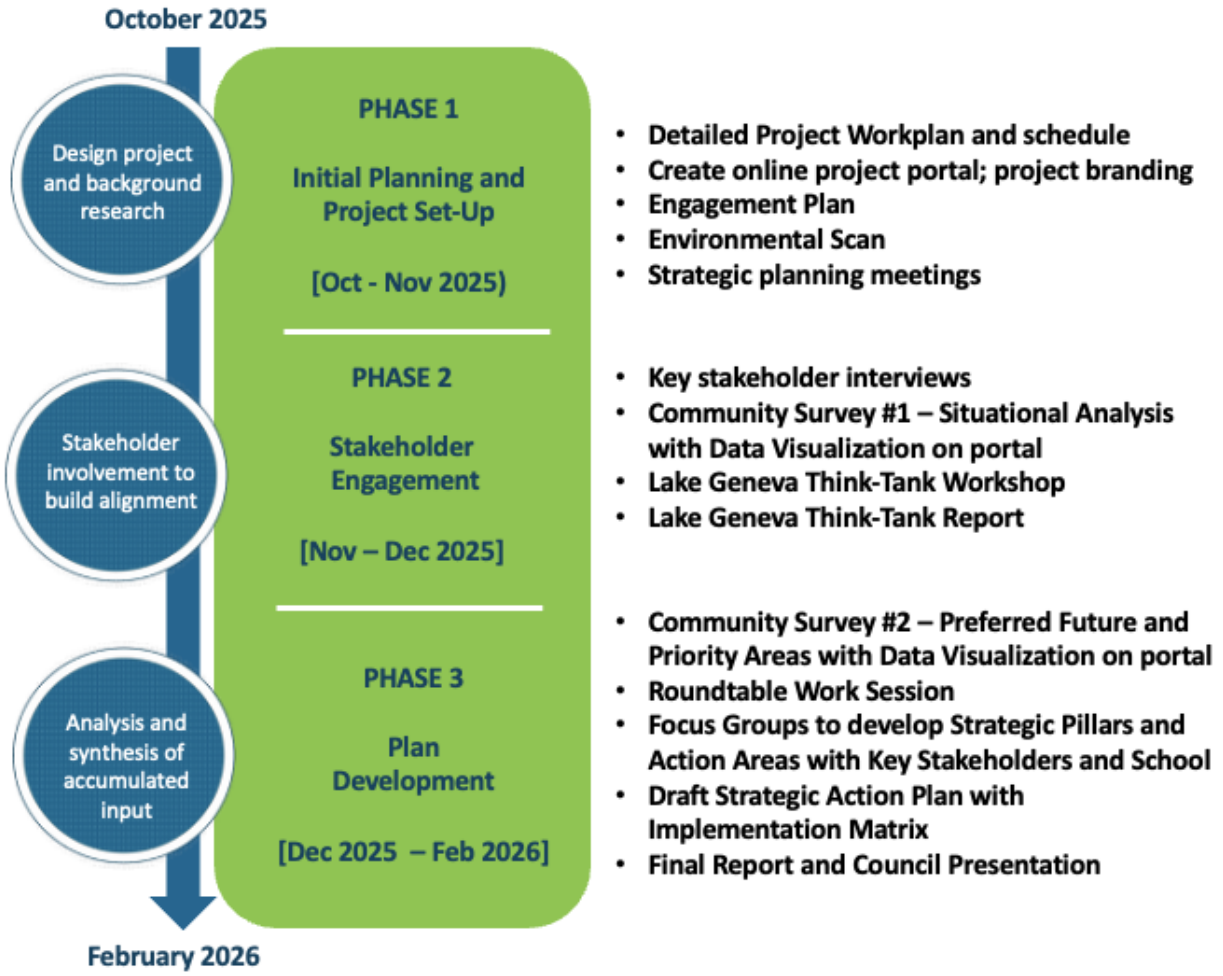
Address:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

Phone:
612.757.9121
Email:
david@future-iq.com

3.0 Summary of the Proposal

The proposed project plan is implemented in three phases that build momentum around a new five-year Strategic Action Plan for the City of Lake Geneva. We understand that the City has undergone several transitions in the last two years and that this is the City's first ever strategic plan. The new Strategic Action Plan is intended to be inclusive and sustainable. It will unify stakeholders, build sustainability and resiliency, and align resources throughout the City. The scope of work will be included in the proposed project plan and incorporated into the three phases outlined below.

Proposed Project Plan

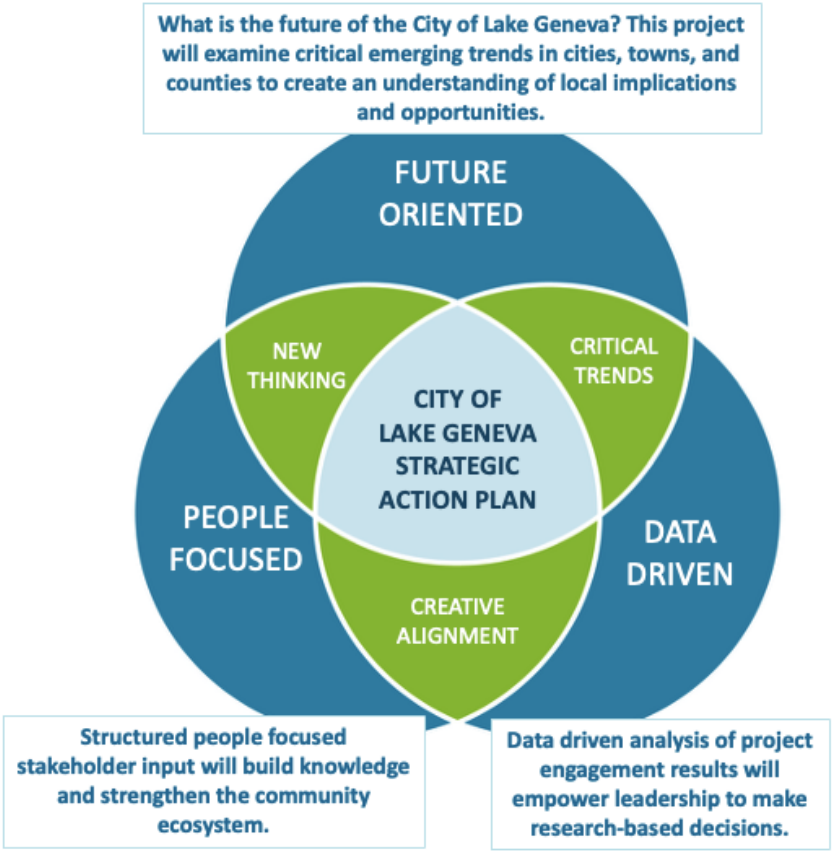


4.0 Recommended Planning Activities and Engagement

4.1 Methodological Approach – Overview

Future iQ brings a global perspective to strategic planning that is invaluable to local interests. For the City of Lake Geneva, this means access to a wealth of knowledge and experience in strategic planning for cities, counties, regions, organizations, and nonprofits. Future iQ will use this experience to guide and inform this project and will work with the Common Council, staff, stakeholders, and community members to develop comprehensive, future-oriented, sustainable, and implementable recommendations to support the new Lake Geneva Strategic Action Plan. The plan will balance priorities across the important dimensions specific to Lake Geneva and incorporate innovative global and local best practices. Future iQ's strategic planning methodology is based on three primary principles:

- **A 'future orientation' principle** is particularly important to take account of rapidly emerging environmental, technological, and societal trends.
- **The 'data driven' principle** ensures the plan is built on solid research and information. Presentation of the quantitative survey and Think-Tank findings are presented using data visualization platform where results can be filtered and viewed in a myriad of ways.
- **The 'people focused' principle** is important to build support for the recommendations, and to harness the best possible input into plan formulation.

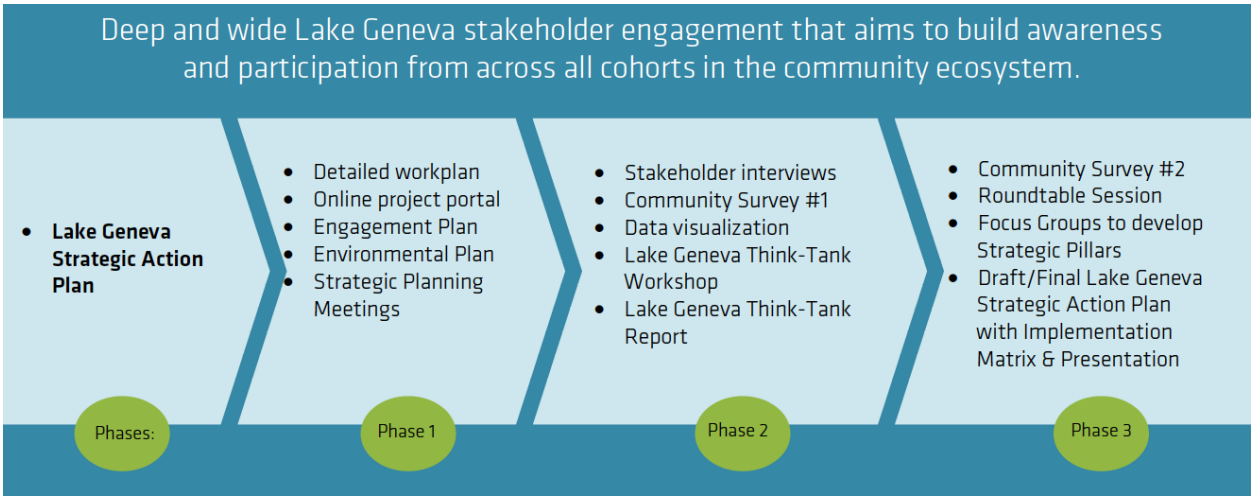


4.2 Engagement Plan

Engagement and transparent communication are cornerstones of Future iQ's strategic planning methodology. Our firm has facilitated strategic planning projects for over 20 years on a global scale, and has led the development of several innovative engagement tools and techniques such as scenario-planning, data visualization, customized foresight research, and The Future Game. We have used our methodologies across multiple settings and have built a reputation for a hands-on, people-focused, and highly customized approach to our projects.

The **Engagement Plan** for this project will be tailored and highly customized to fit the unique needs of the City of Lake Geneva. Future iQ will ensure the strategic planning process is open and accessible to stakeholders, and that multiple opportunities exist to provide input in a variety of formats. We will work closely with Lake Geneva staff to design a variety of engagement and outreach approaches to ensure participation by a broad and deep cross section of the City's community members and stakeholders, including those who don't usually participate in the civic process.

Below is a schematic of the engagement activities that will be included with this project. Additional methodologies may be added throughout the project as needed.



The following two sections outline and highlight the broad range of Future iQ's engagement methodologies and approaches.

PEOPLE-FOCUSED, HANDS-ON ENGAGEMENT METHODOLOGIES

Future iQ maintains a range of innovative proprietary project engagement methodologies. Not all methodologies are used with every project. We tailor the methodologies used to the unique needs of each of our clients.

Methodology	Description	Project Examples
Community and Stakeholder Surveys	Surveys typically gather quantitative and qualitative data that is used to drive our stakeholder data-visualization. Surveys are offered in Spanish and English, hard copy, and digital formats to reach as many cohorts as possible.	• VT Future Forests Stakeholder Survey • Falmouth, ME Community Survey • Littleton, CO Spanish and English Stakeholder Surveys
Listening Sessions & Interviews	These important initial public engagement interactions gather stakeholder input on concerns and aspirations for the future of communities or organizations. Virtual and in-person listening session allow exploration of local issues and concerns.	• University City Community Vision 2040 Listening Sessions • Middle Georgia Innovation Project – stakeholder interviews
Project Portal & Discussion Boards	Project Portals are the 'go to' place for stakeholders to find project information. Discussion Boards are a moderated on-line discussion methodology. These are effective for more complex discussions on topics to creatively explore ideas and issues.	• Future iQ Project Portals • Traverse City, MI Project Portal • Sugar Land, TX Project Portal • Smithville, MO Comprehensive Plan Discussion Boards
Future Game	The Future Game is a unique future planning simulation tool that rewards collaboration, innovation and teamwork. Playing the game allows stakeholders to apply the learning from the game to their own decision making and planning.	• National Congress of American Indians Future Game
Data Visualization	Future iQ's data visualization of survey data on the project portal provides a fun and interactive way to give transparent feedback to stakeholders while at the same time exploring issues of importance.	• Greater Mankato 2040 Data Visualization • Traverse City, MI Data Visualization • Keene, NH Data Visualization
Think-Tank	Think-Tanks are a scenario-based strategic planning methodology. This is very powerful way to create plausible futures and explore concepts of Preferred and Expected Futures. Typically, 50-150 people take a deep dive into future exploration.	• Sugar Land, TX Think-Tank • Romulus, MI Think-Tank • University City, MO Think-Tank • **Greenwood, MO Think-Tank** • PlanKCK, KS Vision Summit
Vision/Strategy Workshops	Community or Stakeholder Vision and Strategy Workshops take place after the scenario-development at the Think-Tank. The aim of these workshops is to build a deeper understanding of the preferred future and to gather wide input on preliminary strategies.	• Coppell Vision 2040 Community Visioning Workshops • Smithville, MO Community Visioning Workshops
Focus Groups	Future iQ developed a Focus Group methodology that is used to build out the detail of the strategic pillars that are the foundation of a community vision. These are smaller, topic-dedicated expert groups.	• Falmouth Vision and Values Focus Groups • The Future of Wellbeing Focus Group summaries
Future Summits	Future Summits are large scale stakeholder events, that are often capstone events to present project results. Future iQ also utilizes rapid polling and final survey work to gather stakeholder input at these events.	• Greenwood, MO Future Summit • Traverse City, MI Future Summit • Keene, NH Future Summit

PEOPLE-FOCUSED ENGAGEMENT APPROACHES TO STAKEHOLDER COHORTS

Future iQ's people-focused engagement is welcoming and inclusive of all stakeholder cohorts. We strive to include those who don't usually participate in the public process.

Cohort	Approach	Project Examples
Youth	Future iQ strongly supports incorporating the youth voice into visioning and planning processes. We work with high school and university cohorts, recreation groups, and plenary sessions with 500+ students.	• Smithville, MO Youth sessions • Mitchell, SD Youth Sessions & Survey
Seniors	Populations are aging in many communities and as a result, Seniors are an important demographic impacting infrastructural and programmatic community needs. Future iQ seeks out Senior input at living places, Senior Centers, faith centers, Homeowner Associations, etc.	• Park City, UT Senior Center • Wayzata, MN Engagement • Hilton Head Island, SC Engagement
Minority Groups	Significant barriers exist that prevent underrepresented groups from participating in civic processes. Future iQ breaks down these barriers by translating materials and going to gathering places such as faith places, workplaces, multi-cultural and community centers, and community eating places.	• Moab, UT Spanish Speaking Community • Park City, UT Latinos in Action • Coppell, TX Community Fabric • **UG Wyandotte County-KCK Vision Summit**
Business and Industry	Planning for economic development requires the input from business and industries. Future iQ gathers this important input by facilitating online and in-person focus groups at individual businesses, chambers of commerce, rotary, industry and trade associations events.	• VT Forests Industry Roundtables • Middle Georgia Charrette Process • IMEC Stakeholder Group Sessions • IDNR Industry Focus Group Survey • NERDIC Industry 4.0 Readiness
Working Parents	Future iQ recognizes that working parents are a cohort that is stretched thin with responsibilities. We hold project activities in suitable timeslots, and particularly in the evenings to accommodate this cohort. We also reach out through PTOs, school newsletters, and events.	• University City, MO Evening Sessions • Waseca, MN Engagement Sessions
Young Professionals	We understand that young professionals have very little time for extra activities in their lives. Future iQ goes directly to this cohort through young professional organizations, networking, and training events.	• Middle Georgia Engagement • Moab, UT Young Professionals • Wayzata, MN Engagement
Officials and Community Leaders	Elected officials and community leaders are critical advisors to any project. Future iQ provides information to this cohort through Council briefings and gathers input at City-sponsored and project events, professional conferences, and speaking opportunities.	• Trotwood, OH Fostering Leadership • NADO Training Conference • VT Future Forests Industry Roundtables
General Public	Future iQ provides transparency and multiple avenues for input from the public. We do this through means such as emails, social media, newsletters, open forums, Town Hall meetings, workshops at community centers and libraries.	• University City, MO Community Centers • Mitchell, SD Community Sessions • Falmouth, ME Online Summits

4.3 Scenario-Based Think-Tank Methodology

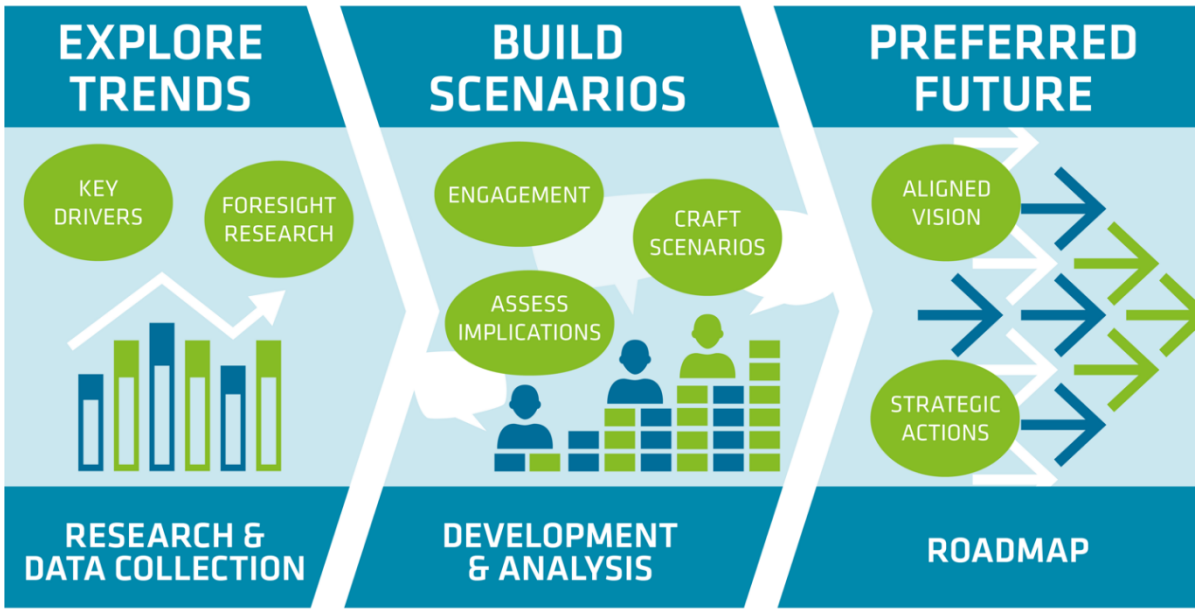
Future iQ uses a scenario planning approach to strategic planning, with a dedicated two-session Think-Tank workshop. The Think-Tank creates scenarios that are not predictions but will, through the Think-Tank process, produce four plausible futures for the City of Lake Geneva. Key aspects and features of the approach include:

- The Think-Tank results will be instrumental to the end of the project. The process is inclusive, easily scalable, and can draw input from all cohorts of the City's community ecosystems.
- It is front loaded with a presentation of key future trends that relate to Lake Geneva and the results from the Community Survey.
- Participants discuss the key drivers that are important to the City's strategic planning process. These key drivers are then ranked with the Think-Tank participants relating to importance and urgency.
- The Scenario Matrix is developed by Future iQ from the first part of the Think-Tank.
- Four plausible scenarios are developed in the later stages of the Think-Tank. This allows stakeholders to visualize different possible futures for Lake Geneva.
- Scenario names and descriptions are described by the Think-Tank participants.
- The expected, preferred, and least desired futures are produced and uploaded to the Lake Geneva project portal.
- The scenario-planning process illustrates the interconnectedness of planning processes and encourages more holistic planning.
- The journey from the expected future to the preferred future is then pursued by building out the steps to get there.

There are several important design principles to the proposed strategic planning approach, including:

- Strong collaborative and inclusive people-focused approach. The long-term success of this project will be dependent on building strong collaboration among the City's various stakeholders. The development of this type of 'eco-system' needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for Lake Geneva.
- Future oriented. Building a City-wide shared vision will be critical for Lake Geneva. To develop an agreed upon vision and plan, stakeholders will need clarity and a common understanding of the drivers impacting the City's operations.
- Data driven approach, including data visualization. Our experience suggests that projects like this are most successful when built on transparent data driven approaches, inclusive of as many stakeholder voices as possible.
- Project management and communication strategy. Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.

Below is the visual outline of how Future iQ's scenario-based strategic planning process works.



For Lake Geneva, the Think-Tank process can further examine circumstances including:

- What makes Lake Geneva unique and how can the City use these characteristics to prepare for the future?
- How will stakeholder preferences fit into this vision and how will their evolving demographics be incorporated into the new vision?
- How should funds be invested and leveraged to build resiliency for the City?
- How does Lake Geneva fit into the larger statewide ecosystem?
- What are the specific strategic gap and growth areas for Lake Geneva and does previous planning address those areas?
- How may financial/budgetary issues on the state level impact Lake Geneva and how can the City prepare for potential budget challenges?
- What unique hurdles might the City face, and how do we build collaborative approaches and structures to ensure continued successful programs and services for its community members and stakeholders?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story stakeholders want to tell, and what future do they want for Lake Geneva?

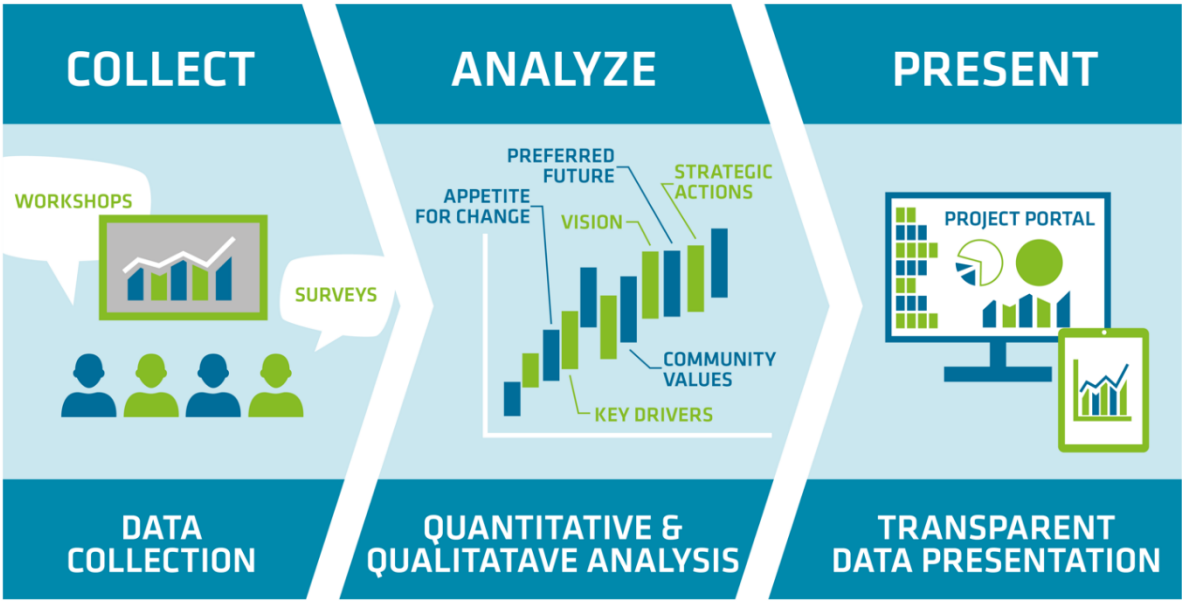
The methodology being proposed by Future iQ in this proposal is more in-depth than a SWOT analysis and will allow community members and stakeholders to tackle these questions in an engaging and thought-provoking manner. Following the Think-Tank, Future iQ will produce an in-depth **Lake Geneva Think-Tank Report**. This will then lead to the clarification of the emerging vision and focus areas that will serve as a foundation for the Lake Geneva Strategic Action Plan.

4.4 Data Visualization

Data collection and development from surveys provides an inclusive process and a comprehensive understanding of community and stakeholder views and where points of consensus lie. Future iQ will use an online Lab Portal to collect and display community survey results. For examples, please see http://lab.future-iq.com. This approach provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across community ecosystems.

Data visualization allows individual stakeholders to see where they fit into community perspectives.

The strategic planning process for Lake Geneva includes surveys that will reach as many community members and stakeholders as possible. Future iQ's data visualization allows viewers to sort and filter the data by cohort group, revealing sentiments by cohort filters such as City affiliation, neighborhood, age, etc. The Lab also serves as a central location where stakeholders can go to find updated project information and notices.



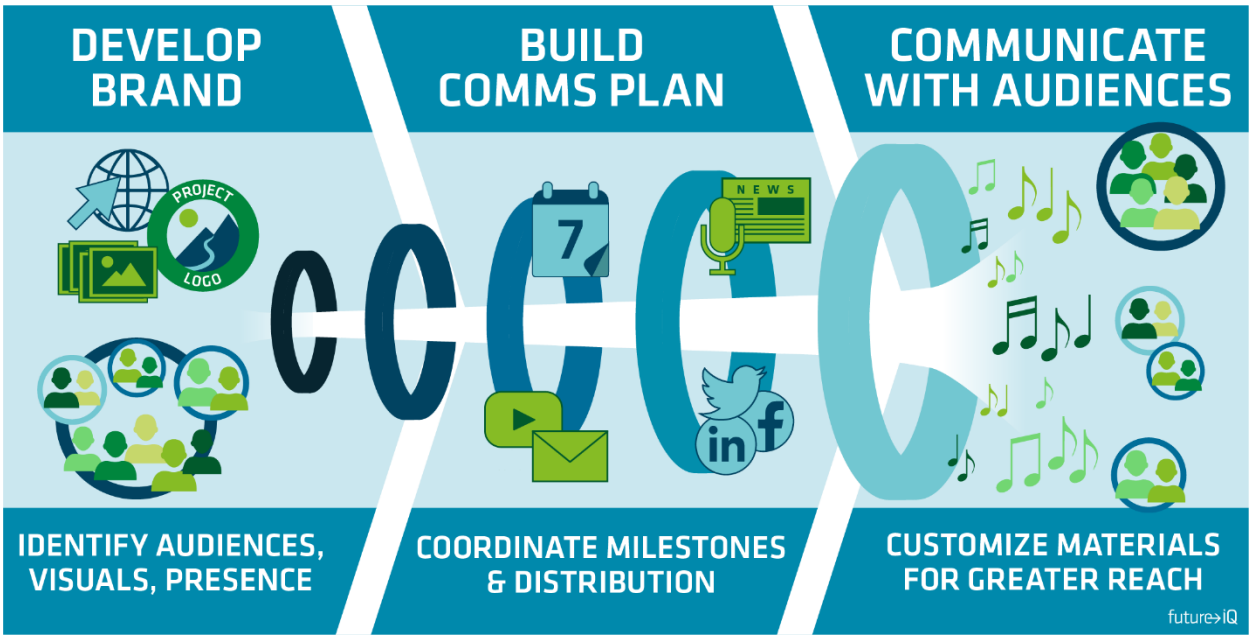
Future iQ prioritizes ensuring our content, analysis, and findings are easy to understand and approachable for all audience types. This helps make sure that our engagement reaches a wide variety of community members and conversations can dive deep regardless of participants' familiarity on the topic. The strategic planning process is an important time for Lake Geneva. By leveraging data visualization and easy-to-follow content, we draw higher participation rates and more meaningful conversations.

4.5 Project Portal and Communications

Effective communications support the storytelling of a project and builds trust within the community.

Communications are integral parts of Future iQ's methodologies. We take care to provide project information to stakeholders that is approachable, accurate, and sensitive to local concerns. Our communications involve both digital and traditional methods to include as broad an audience as possible. We work closely with our clients to maintain regular communications for the duration of the project. It is our experience that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.

A key part of our communications is the distribution of information via the associated customized project portal. The **project portal** serves as a central location where community members and stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. The portal provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across a community ecosystem. Visit lab2.future-iq.com for examples. Note the project portal has a translation feature that may be turned on by users to translate the portal into many languages including Spanish.



5.0 Work Plan & Timeline

5.1 Proposed Project Timeline

The following chart outlines key tasks and suggested periods of activities for this project's Work Plan. This timeline reflects the relative emphasis of activity. Work on several of the key deliverables will occur in parallel to allow the phases to be completed within the project timeline. We will work with Lake Geneva staff to create a timeline that incorporates the specific needs of the City and remains flexible over the course of the project.

Key Phases	Key Deliverables	O	N	D	J	F
Phase 1: Initial Planning and Project Set-Up	Detailed Project Work Plan and schedule					
	Create online project portal; project branding					
	Engagement Plan					
	Environmental Scan					
	Strategic planning meetings					
Phase 2: Stakeholder Engagement	Key stakeholder interviews					
	Community Survey #1 – Situational Analysis with Data Visualization on portal					
	Lake Geneva Think-Tank Workshop					
	Lake Geneva Think-Tank Report					
Phase 3: Plan Development	Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal					
	Roundtable Session with Council and Staff					
	Focus Groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School					
	Draft Lake Geneva Strategic Action Plan with Implementation Matrix					
	Final Report and Council Presentation					
Ongoing	Weekly meetings with client liaison					
	Project portal updates					
	Engagement and Communication Plans ongoing delivery					

5.2 Work Plan Details

Future iQ works hard to deliver our projects on-time and on-budget. Below is a detailed description of the three phases of our proposed Work Plan for this project.

The initial planning and project set-up invites participation, creates anticipation, and sets the tone for the planning process.

5.2.1 Phase 1: Initial Planning and Project Set-Up

This project will begin with meetings with City staff to establish a final **Work Plan and schedule** that provides a detailed explanation of the overall project design and more clearly defines roles, tasks, timelines, and responsibilities throughout the life of the project. Additionally, the project's **Engagement Plan** will be a detailed plan outlining the specific engagement activities to occur throughout the project. The Engagement Plan for this project will be flexible and tailored to fit the broad needs of the City's community members and stakeholders.

To familiarize ourselves with the City environment, the project team will conduct background research consisting of a **review of existing documents** and materials exploring impacting trends and the current City environment and plans. This will be undertaken to understand those strategic directions already established and to identify progress made towards those objectives. This situational analysis will help team members to build a firm understanding of local accomplishments, challenges, goals, and priorities. This information will be compiled into an **Environmental Scan Report** for reference throughout the strategic planning process.

During Phase 1, Future iQ will create a unique project portal. The **project portal** serves as a central location where stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. Communications will involve both digital and traditional methods to reach as broad an audience as possible. This project team will schedule **weekly strategic planning calls** with our City staff contact throughout the duration of the project. It is our firm belief that regular communications keep communication lines open and add to the transparency of the planning process.

Deliverables from Phase 1 will include**:**

- Detailed Project Work Plan and schedule
- Create online project portal; project branding
- Engagement Plan
- Environmental Scan
- Strategic planning meetings

RFP requirements addressed by deliverables in Phase 1:

- Design of an inclusive planning process that involves input from Council members, City Staff, residents, businesses, and input from historical planning efforts such as the Comprehensive Plan.
- Environmental Scan

5.2.2 Phase 2: Stakeholder Engagement

Scenario development will allow stakeholders to explore future planning options and to visualize possible futures for Lake Geneva.

The project team will begin Phase 2 with the launch of a **Community Survey #1** that will analyze stakeholder sentiment and appetite for change and future readiness. The results of the Community Survey will be posted on the project portal using a **data visualization platform**.

Future iQ will also conduct **key stakeholder interviews** with key stakeholders to gather personal insights and thoughts on the current conditions and the future for Lake Geneva. This is intended to provide background information for the project team, and to promote the strategic planning process. This will familiarize stakeholders with the project team and ensure 'buy in' on the strategic planning process from the start.

Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping both rural and urban areas. This future-oriented lens guides Phase 2 as it creates the building blocks of the preferred vision for Lake Geneva using a scenario-based planning methodology. Using trend research and expectations about cities and counties, this methodology will enable stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a two-session in-person **Lake Geneva Think-Tank Workshop.**

The methodology being proposed is more in-depth than a SWOT analysis and will lead to the clarification of a preferred vision and preliminary strategic action areas for the City that will serve as the foundation for the Lake Geneva Strategic Action Plan. The results from the survey and Think-Tank will be compiled in the **Lake Geneva Think-Tank Report** and posted on the project portal.

Deliverables from Phase 2 will include:

- Key stakeholder interviews
- Community Survey #1 – Situational Analysis with Data Visualization on portal
- Lake Geneva Future Think-Tank Workshop
- Lake Geneva Future Think-Tank Report

RFP requirements addressed by deliverables in Phase 2:

- Development of Mission, Vision, and Values Statements.
- SWOT Analysis (Think-Tank).
- Development of initial framework for goals, objectives and strategies for the plan.

5.2.3 Phase 3: Plan Development

After the Think-Tank, the project team will then conduct a second **Community Survey** to collect feedback on the Preferred Future and Priority Areas for the Strategic Action Plan. Future iQ will also facilitate a **Roundtable Session** with the Common Council and Staff as well as **Focus Groups** with specified stakeholder groups (including the School) to build out the Strategic Pillars of the Strategic Action Plan. These Focus Groups will explore the goals and actions needed to get to the preferred future for Lake Geneva. The project team will develop action areas for each of the Strategic Pillars in the new Strategic Action Plan.

The Strategic Action Plan will articulate clear guidance on the steps needed to achieve the preferred future for Lake Geneva.

After the development of the Strategic Pillars and Action Areas at the Focus Groups, Future iQ team members will work closely with Lake Geneva staff to craft a detailed framework for the Strategic Action Plan including a timeline with responsible parties and an **Implementation Matrix** for ongoing monitoring and reporting. This will in involve careful synthesis of all research, engagement results, surveys, reports and analyses. The project team will produce a **draft of the Lake Geneva Strategic Action Plan** and seek input from the Common Council and City Staff. The final draft will provide feedback mechanisms and a systematic approach to future review and adjustments to the plan. The Project Director will present the final Plan to the Common Council and City Staff.

Measuring Effectiveness - Understanding and measuring progress in key performance areas will be an important part of implementing the Lake Geneva Strategic Action Plan. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. Phase 3 of this project plan includes the development of measurements to support periodic review and adjustment of strategic action plan over time.

Deliverables for Phase 3 include:

- Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal
- Roundtable Session with Council and Staff
- Focus Groups with specified stakeholder groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School
- Draft Strategic Action Plan with Implementation Matrix
- Final Report and Council Presentation

RFP requirements addressed by deliverables in Phase 3:

- Final development of goals, objectives and strategies for the Strategic Action Plan.
- Development of timeline, responsible parties and costs in an Implementation Matrix that will identify key performance indicators and allow for monitoring of success and consideration for the next strategic planning process.

6.0 Staffing Plan

The client-facing Future iQ team members presented in this proposal have significant experience working on visioning, strategic planning, and economic development projects in both rural and urban settings. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and/or virtually, and for data analysis and report preparation.

The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning, strategic planning, economic development, and foresight research
- Knowledge and experience with cities, counties, state agencies, municipalities, corporations, regional entities, and non-profit organizations
- Project management, stakeholder engagement, and workshop facilitation
- Communications, graphic design, data visualization, and project branding

Project Director David Beurle will be the primary contact person for this project. Below are the respective team member roles for this project.

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, Facilitation, Strategy Development
Adam Bentley	Research Strategist	Research and strategy development
Celine Beurle	COO, Future iQ	Communications
Heather Branigin	VP, Foresight Research	Project Coordinator, Foresight Research
Brittany Rempe	Creative Director	Graphic design and branding
Tobiloba Adaramati	Data Analyst	Data Analysis
Walter Paixao-Cortes	Data Engineer	Data Visualization

For complete project team resumes, please see **Appendix A.**

7.0 References

Below are four recent references for Future iQ's work on strategic planning. Additional references are available upon request.

City of Traverse City, Michigan (2024-2025) Strategic Action Plan	Elizabeth Vogel City Manager City of Traverse City 400 Boardman Avenue Traverse City, MI 49684 Tel: 231-922-4700 Email: evogel@traversecitymi.gov
City of Romulus, Michigan (2022-2023) Vision Romulus – Our Community, Our Future	Julie A. Wojtylko, CPM Chief of Staff City of Romulus Office of the Mayor Tel: 734-955-4501 Email: jwojtylko@romulusgov.com
City of Smithville, Missouri (2019) Vision and Strategic Action Plan; Smithville Comprehensive Plan (2019-2020) Smithville Parks & Recreation Master Plan (2021) Smithville Transportation Master Plan (2021-2022)	Cynthia Wagner City Administrator City of Smithville Smithville, MO 64089 Tel: 816-532-3897 Email: cwagner@smithvillemo.org
Sugar Land, Texas (2024-2925) Strategic Action Plan	Brittaney P. Sinclair, Assistant Director Strategic and Government Affairs City of Sugar Land 2700 Town Center Blvd N Sugar Land, TX 77479 Tel: 281-302-8885 Email: bsinclair@sugarlandtx.gov

8.0 Examples of Strategic Planning Documents

This project will explore complex issues to develop a forward-thinking strategic plan that unifies, strengthens, and advocates for the City of Lake Geneva in new ways. Examples of our project reports and various foresight research reports can be found on the Future iQ website and on Future iQ's stakeholder Research Laboratory. Please click on the links below to access reports and materials for each strategic planning project.

8.1 Highlight Strategic Planning Projects

- **City of Traverse City, MI** Strategic Action Plan
  This recent project created a strategic plan for Traverse City looking out to 2030. The objective of the strategic planning process is to build on Traverse City's current success and incorporate new actions to maintain this success over the next 5 years. The process involved key stakeholder interviews, two surveys, a Think-Tank, Focus Groups, a Roundtable Session, and a Community Dashboard/Balanced Scorecard.
- **City of Essex Junction, VT** Vision and Strategic Action Plan
  Future iQ recently completed this visioning and strategic planning project. The visioning included transparent, deep and robust community engagement as a focus of the strategic planning process. The Strategic Action Plan defines priorities and will guide decision making over the next five years.
- **City of Romulus, MI** Community Vision and Action Plan
  Romulus is a diverse community situated around the Detroit Metropolitan Airport. Recently completed, this community-wide effort brought the community together through extensive engagement methods to identify a realistic vision for the future of the City. The intention of the process was to create a unified Community Vision plan that would inform decision-making on planning, land use, and policy making for the City.
- **Lorain County, OH** Loraine County Strategic Action Plan
  The Lorain County Board of Commissioners recently embarked on a comprehensive and sustainable 5-year Strategic Action Plan for the County. The objective of this strategic planning project was to build on Lorain County's current success and incorporate new actions to maintain and enhance this success over the next 5 years.
- **City of Sugar Land, TX** Strategic Action Plan
  To continue its current success, the City of Sugar Land aspires to be even more ambitious, innovative, and forward-thinking with a commitment to improvement and a continuation of being a 'Trailblazing' city. The outcome of this process, running July 2024 through January 2025, produced a robust, comprehensive and sustainable Strategic Action Plan.
- **City of Coppell, TX** Community Vision and Strategic Action Plan
  Coppell is a community that has a growing Asian population, currently almost a third of the population. Future iQ worked closely with stakeholders to create a vision and action plan that was welcoming and inclusive of all new community members.
- **City of Pflugerville, TX** Strategic Action Plan
  The strategic planning process for this recent project aimed to build on Pflugerville's current success and incorporate new actions to maintain this success over the next 5 years.
- **City of Smithville, MO** Comprehensive Plan

Facilitated by Future iQ and JS&A, this original comprehensive planning project was built on the community's visioning and strategic planning process that Future iQ also facilitated. The plan involved the strategic economic development of unique character areas and StoryMaps of each identified area of the City. The strategic pillars that emerged from the original strategic planning process were instrumental building blocks of the Comprehensive Plan. Two areas for further study that emerged from the comprehensive planning process were the need for a Parks and Recreation Master Plan, as well as a Transportation Master Plan.

- **University City, MO** Community Vision and Strategic Roadmap
  Future iQ completed the community visioning and planning for University City, a diverse community with significant economic disparities. Led by a Task Force comprised solely of community members, the roadmap that emerged from this process celebrated the rich diversity of the community and incorporated this strength into its vision for the future.
- **City of Edina, MN** Vision Edina and Nodes and Modes Bridging to Comprehensive Plan
  After facilitating the Edina's strategic visioning process, Future iQ led a bridging planning process that coupled together neighborhood development with multimodal transport connections. The concept guided the city's comprehensive planning process as the community sought to enhance the city's characteristics and community fabric, while at the same time embracing urban renewal and targeted redevelopment.
- **City of Moab, UT** Moab – Tomorrow Together
  Future iQ recently completed the community visioning and strategic planning for the City of Moab. The results of this process set the framework for future land use, economic, social and environmental decisions. A key goal of this process was to help the community articulate tangible and intangible elements that, if lost, would fundamentally change the character of Moab.
- **Park City, UT** Community Vision and Action Plan
  The visioning and strategic action planning for this project engaged approximately 1,700 people in a series of surveys, engagement sessions, focus groups and two key Future Summits. The process was designed to provide an open, inclusive and transparent platform for community members to help create a shared vision and board action plan for Park City.
- **Town of Falmouth, ME** Vision and Values The community of Falmouth developed a Town Vision and Values statement through a robust visioning process prior to embarking on the update of its latest Comprehensive Plan. The engagement process was designed to provide and open, inclusive, and transparent platform for community members to help create a shared community vision and values for the future.
- **City of Mitchell, SD** Community Vision and Strategic Action Plan
  The Forward 2040 project brought the community together with a large-scale visioning and strategic planning process to meet the future challenges facing the community. The work was built on open and transparent public participation and thoughtful and constructive dialogue. The final plan includes a strategic roadmap for community decision-making looking out to 2040.

8.2 Additional Strategic Planning Projects

The majority of Future iQ's experience is working with public agencies and municipalities in the United States. Our national reach enables us to provide clients with insights from cities, counties and organizations in both urban and rural areas. We specialize in visioning and strategic planning and provide highly customized plans that are tailored to each of our clients. Below are additional examples of Future iQ's visioning and strategic planning projects. Work products and project summaries are available in the embedded links below.

- U.S. Department of Defense, Madison F35 Community Connection Project
- New North Inc., WI Business Intelligence Strategic Planning
- Oshkosh Initiative, WI Regional Collaborative Action Plan
- East Central WI Regional Planning Commission, WI Fox Valley Regional Planning
- McHenry County College, IL Strategic Foresight Project
- City of Trotwood, OH Organizational Strategic Plan
- City of Wayzata, MN Wayzata 2040 Community Vision
- B.E.S.T. of Waseca County, MN Community Vision and Strategic Action Plan
- Town of Hilton Head Island, SC Vision and Strategic Action Plan
- City of Keene, NH Vision Keene 20-Forward Comprehensive Master Plan (CMP)
- City of Greenwood, MO Vision Greenwood Comprehensive Master Plan
- Abbeville County, SC Strategic Plan
- Lower Savanah Council of Governments, GA Strategic Action Plan
- Flint Hills Regional Council, KS Sustainability Plan and Roadmap
- Greater Mankato 2040, MN Regional strategic visioning project
- City of Littleton, CO Comprehensive Economic Development Strategic Plan
- UG of Wyandotte County-Kansas City, KS Economic Development Strategy
- State of Vermont, VT Vermont Forest Future Strategic Roadmap
- Iowa Department of Natural Resources, IA Strategic Vision for Iowa
- Denton, TX Comprehensive Solid Waste Management Strategy
- McKinney, TX Solid Waste Management Strategy
- Middle Georgia Creating an Innovation Corridor
- Greater Bemidji, MN Strategic Action Plan Update
- Smithville School District, MO Organizational Strategic Plan
- Greater Lima Region, OH Collaborative Action Plan
- Tillamook County, OR Tourism Investment Strategic Vision Action Plan
- Moosehead Lake Region, ME, Regional Vision and Strategic Action Plan
- Snohomish County, WA Regional Destination Visioning and Planning
- Scott County, MN Visioning and Planning
- Kewaunee County, WI Regional Planning
- National Association of Development Organizations (NADO), DC Strategic Action Plan
- Council of State Community Development Agencies (COSCDA), DC Strategic Action Plan
- New Hampshire Aerospace and Defense Consortium (NHADEC), DC Strategic Action Plan

9.0 Proposed Cost Proposal

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director and all staff. We assume that the City of Lake Geneva will provide venues for workshop sessions and presentations, as required. Please note that our fees and project plan are flexible and easily scalable depending on the needs of Lake Geneva.

Key Phases	Key Deliverables	Core Tasks
Phase 1: Initial Planning and Project Kickoff	• Detailed work plan and schedule • Create online project lab portal; project branding • Engagement Plan • Environmental Scan • Strategic planning meetings	$0 $2,000 $1,000 $1,000 $2,000 $1,000
Phase 2: Community Engagement	• Key stakeholder interviews • Community Survey #1 – Situational Analysis with Data Visualization on portal • Lake Geneva Think-Tank Workshop • Lake Geneva Think-Tank Report	$2,000 $4,000 $7,000 $2,000
Phase 3: Plan Development	• Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal • Roundtable Session with Council and Staff • Focus Groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School • Draft Lake Geneva Strategic Action Plan with Implementation Matrix • Final Report and Council Presentation	$4,000 $3,000 $8,000 $6,000 $2,000
TOTAL	**FIXED PRICE PROPOSAL**	**$45,000**

Includes ongoing project management work, including weekly/bi-weekly meetings with client liaison, Board meetings, project portal updates and management to a detailed work plan.

Proposed payment schedule:

- 25% on signing of contract
- 25% on completion of Phase 1
- 25% on completion of Phase 2
- 25% on completion of Phase 3

10.0 Complete Team Resumes

10.1 Project Director, David Beurle, CEO, Future iQ

RÉSUMÉ

david@future-iq.com

David Beurle is a world-renowned strategist, futurist, researcher and practitioner. As founder and CEO of Future IQ, David is a pioneer and expert in creating new and innovative future planning approaches for use in community, regional, industry, organizational and government settings. David has pioneered the application of scenario planning within regions, industry and corporations around the world. David created the Future Game™, a global planning and workshop tool that has been used in over 600 workshops across 10 countries. As CEO of Future IQ, David has led global projects across 4 continents and has written a number of foresight papers: future-iq.com/foresight-research.

Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has the major role in all of Future IQ's projects as lead project manager. More details on David's work can be seen at davidbeurle.com.

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder & CEO Future IQ, USA & Europe, 2003 – Present

Principal Adviser, Minister for Primary Industries, Western Australia, 1991 – 2000

Rangeland Scientist, Western Australian Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

Founding member, Plant-Based Product Council, USA, 2019

future→iQ

Create **Future Intelligence**™

www.future-iq.com

DAVID BEURLE B.SC. AGR

CHIEF EXECUTIVE OFFICER

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023 – 2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- COSCDA Strategic Action Plan, Washington DC, 2023 – 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Littleton Comprehensive Economic Development Strategy, Colorado, 2023
- Unified Government Economic Development Strategic Plan, Kansas, 2023
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together – Greater Mankato 2040, Minnesota, 2022-2023
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Smithville Schools District Strategic Plan, Missouri, 2023
- Florida Network Mapping, Florida, 2022
- Vision Romulus, Our Community, Our Future, Michigan, 2022
- Transforming Together Tomorrow - Greater Mankato, Minnesota, 2022
- Moab - Tomorrow Together, Utah, 2022
- The Future of Well Being Foresight Project, Minnesota, 2021-2022
- Envision East Central Iowa, Iowa, 2021-2022
- University City Community Vision, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy, New England, 2021-2022
- City of Smithville Transportation Plan, Missouri, 2021-2022
- Town of Falmouth Vision & Values, Maine, 2020-2021
- The Middle Georgia Innovation Project, Georgia, 2020-2021
- City of Smithville Comprehensive Plan, Missouri, 2020
- Park City Community Vision & Strategic Action Plan, UT, 2019-2020
- NOHOA Community Survey 2019-2020
- ECC Medical/Well-Being Strategic Marketing Plan & Economic Development Plan, Minnesota, 2016-2019
- Tillamook County Strategic Vision & Action Plan, Oregan, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Future of Urban Living Think Tank, St Georges House, Windsor Castle,UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017-2018
- City of Coppell, TX, Community Visioning, 2018-2019
- Maine Woods, Tourism Impact Study, 2017-2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016-2018
- North Coast, Oregon, Tourism Destination Management, 2018-2019
- New Hampshire Aerospace & Defense Consortium, Strategic Action Plan, 2017-2018
- Hilton Head Island, South Carolina, Community Visioning Project, 2016-2017
- University of MN, Future of Midwest Agriculture, 2016-2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015-2017

RECENT PUBLICATIONS

- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- The Future of Manufacturing in Illinois, 2022
- Envision East Central Iowa Final Report, 2022
- University City Community Vision Final Report, 2022
- Town of Falmouth Vision & Values Final Report, 2022
- The Middle Georgia Innovation Corridor Report, 2021
- City of Smithville Parks & Recreation Master Plan, 2021
- The Holding Space: A Guide for Partners in Tribal Research, 2020
- The Future of Urban Living, 2019
- The Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017-2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015

RECENT KEYNOTE PRESENTATIONS

- County Commissioners Association of Ohio Summer Symposium, August 2024
- SMART Manufacturing Conference, Pennsylvania, October 2022
- ITB Berlin Travel Trade Show, Berlin, March 2022
- The Mahoosuc Way Summit, Maine, February 2022
- Aggregate Producers of Wisconsin Annual Convention, Wisconsin, December 2021
- Ohio Food Summit, Ohio, USA, March 2020
- Greater Mankato Annual Summit, Minnesota, USA, March 2020
- New North Regional Summit, Wisconsin, USA, December 2019
- New Hampshire PTAC Conference, NH, USA, December 2019
- Institute of Directors (IoD) Annual Conference, Gleneagles, Scotland, October 2019
- E.P.I.R.C Manufacturing Conference, PA, USA, October 2019
- City of Smithville Youth, Missouri, USA, September 2019
- AgFutures 2035 Conference, Perth, Australia, August 2019
- Agricultural Symposium keynote, Emmetsburg, Iowa, USA, March 2019
- Wisconsin Integrated Resource Management Conference, Stevens Point, Wisconsin, USA, February 2019
- The Future of Urban Living Consultation, St George's House, Windsor Castle, UK, December 2018

10.2 Adam Bentley, Research Strategist, Future iQ

RÉSUMÉ

adam@future-iq.com

EDUCATION

Bachelor of Arts in Political Science, University of Northern Iowa

Master of Public Policy, University of Northern Iowa

Master of Business Administration, Texas A&M-Commerce

EMPLOYMENT

Senior Planner/Economic Development Specialist - East Central Iowa Council of Governments, 2019-2022

Assistant Village Administrator - Waunakee, WI, 2016-2019

Adjunct Faculty - Buena Vista University, 2016-Present

Assistant City Manager - Manhattan, Kansas, 2013-2014

Administrative Assistant to the City Manager - Iowa City, IA, 2011-2013,

Management Fellow, Wichita, KS, 2010-2011

AWARDS / CERTIFICATIONS

Young Professional of the Year 2019- Waunakee Chamber of Commerce

International City/County Management Association (ICMA) Essential Management Skills Certificate

Heartland Economic Development Course (HEDC) Certified

future→iQ

Create **Future Intelligence**™

www.future-iq.com

ADAM BENTLEY B.A., M.P.P., M.B.A.

RESEARCH STRATEGIST

Adam Bentley works for Future iQ as Research Strategist. Adam's background includes experiences working with local and regional governments across the American Midwest. He has a broad background which includes government administration, economic development, strategic planning, human resources, and grant writing. Adam holds a master's degree in public policy from the University of Northern Iowa and a master's degree in business administration from Texas A&M-Commerce. He also serves as an adjunct faculty member for Buena Vista University teaching courses in government, management, and liberal arts.

Adam has a passion for public service and continues to volunteer in local city and non-profit organizations to help improve his community.

RECENT PROJECT EXPERIENCE

- Traverse City Strategic Action Plan, Michigan, 2024 - 2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- Cornell College Strategic Roadmap Development, Iowa, 2023

RELEVANT PUBLICATIONS

- Madison F35 Community Connections Situational Analysis, 2024
- Lorain County Strategic Action Plan Benchmark Report, 2024
- City of Essex Junction Benchmark Report, 2024
- City of Cornell Strategic Roadmap Development Think-Tank Report, 2023

10.3 Celine Beurle, COO, Future iQ

RÉSUMÉ

celine@future-iq.com

EDUCATION

Masters Degree in Sociology

University College Cork, 1998

B.A. Hons Degree in Sociology/ Philosophy

University College Cork, 1996

B.A. Hons Degree Sociology

University of Warwick, 1995

EMPLOYMENT

C.O.O. Future iQ

USA and Europe, 2012 – Present

Managing Director Future iQ Europe, Ltd

Europe, 2012 - Present

Manager, Govt. Employment Service

Ireland, 2003 – 2012

Animal Welfare Policy Chair

Green Party Ireland, 2003 – 2009

future→iQ

Create **Future Intelligence**™

www.future-iq.com

CELINE BEURLE B.A., M.A.

CHIEF OPERATING OFFICER

Celine Beurle is Chief Operating Officer (COO) of Future iQ. Celine is the key project co-ordinator within Future iQ and works as the main point person from Future iQ with clients on the co-ordination and details of many of the larger projects from start to finish.

As joint Owner and Managing Director of Future iQ, Celine has expanded the company since 2012 across Europe (including South America, Italy, Spain, Portugal and the UK). Celine had an academic background to Masters level in both Sociology and Philosophy. As Future iQ's COO, Celine works with the CEO on the overall strategic direction of Future iQ. The academic background that Celine has excelled in, has enabled her to provide the often needed "societal lens" for many of Future iQ's projects.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024 -2025
- Lorain County Strategic Action Plan Task Force and Actions, Ohio, 2024
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Cornell College Strategic Roadmap Development, Iowa, 2023
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Park City Vision 2020, Utah, 2019-2020
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charrette and Regional Planning Initiative, Georgia, 2018
- Coppell Vision 2040,Texas, 2018
- Hilton Head Island Visioning, South Carolina, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, 2016-2017
  Griffith Foods Scenario Planning, Chicago, USA, 2016
- Mediterranean PORTS EU Projects, Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, 2014-2015
- Australian Grain Research and Development Corporation, Western Australia, 2008-2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- LSCOG Strategic Action Plan Think-Tank Report, 2024
- City of Sugar Land Strategic Action Plan Think-Tank Report, 2024
- City of Essex Junction Strategic Action Plan, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- Lorain County Strategic Action Plan, 2024
- City of Essex Junction Think-Tank Report, 2023
- Cornell College Strategic Roadmap Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- Moab - Tomorrow Together Think-Tank Report, 2022
- Park City Vision 2020 Final Vision and Strategic Action Report, 2021
- Middle Georgia Innovation Framework and Ecosystem Report, 2021
- Middle Georgia Innovation Roadmap Report, 2021
- Middle Georgia Innovation Corridor Report, 2021
- Park City Vision 2020 Think-Tank Report, 2019
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- Future iQ Project Communication Plan - Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Monterspertoli Scenario Planning Report, 2014

10.4 Heather Branigin, Vice President, Foresight Research, Future iQ

RÉSUMÉ

heather@future-iq.com

HEATHER BRANIGIN B.A., M.A.T.

VICE PRESIDENT, FORESIGHT RESEARCH

Heather leads Future iQ's research projects and proposal writing, most recently co-authoring The Future of Wellbeing and The Future of Urban Living. She has extensive experience in local government and the nonprofit sector and is an accomplished project manager. Heather has a well-developed ability to assimilate information into thoughtful and coherent report and proposal writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather provides critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerated change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

EDUCATION

Master of Arts in Teaching
Secondary Level, Social Studies

University of St. Thomas, MN
Bachelor of Arts in Political Science/ International Relations
Advanced Language Certificate: French Literature
Carleton College, MN
Honours Degree, Neuchâtel Jr. College, Neuchâtel, Switzerland

EMPLOYMENT

Vice President, Foresight Research, Future IQ, 2016-present
City of Edina, MN, 2013-2016
NCCA-National Model United Nations, Minneapolis, MN, 2010-2013
UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Volunteer Judge, Future City Competition, 2017

Co-President (2011-2013); Board Member (2010, 2014) UNA-MN

Board Member and Secretary, Caring for Cats, 2019-2021

Advisory Council Member, UNA-MN, 2014-present

RECENT PROJECT EXPERIENCE

- Jasper Comprehensive Plan, IN 2025-2026
- NH Community Dev. Finance Authority Community Dev. Block Grant (CDBG) Update, 2025
- Greenwood Comprehensive Master Plan, MO, 2024-2025
- Keene Comprehensive Master Plan, NH 2024-2025
- Pflugerville Strategic Action Plan, TX 2025
- Sugar Land Strategic Action Plan, TX, 2025
- COSCDA Strategic Action Plan and Implementation Assistance, Washington, DC, 2023-2025
- Littleton Comprehensive Economic Development Strategy, CO, 2023-2024
- Unified Government of WYCO-KCK Economic Development Strategic Plan, KS 2023
- MN Dept. of HHS, Age-Friendly MN TAP Grant, 2023-2026
- Smithville School District Strategic Action Plan, MO, 2022-2023
- The Future of Wellbeing, MN, 2022
- Transforming Tomorrow Together - Greater Mankato 2030, MN, 2022-2024
- University City Community Vision 2040 Strategic Roadmap, MO, 2022
- ECICOG Comprehensive Economic Development Strategy, IA, 2022
- Falmouth Vision and Values, ME, 2022
- Greater Bemidji Strategic Action Plan Update, MN, 2022
- IMEC Future of Manufacturing in Illinois, 2022
- The Middle Georgia Innovation Project, 2021
- Smithville Parks & Rec Master Plan 2030, MO, 2021
- Denton Comp. Solid Waste Management Strategy, TX, 2021
- The Future of Chiropractic Strategic Visioning, OR 2021
- Smithville Comprehensive Plan, MO, 2020
- Kinship Fellows and Food: Land: Opp. Grantees Summit, IL, 2020
- Trotwood Organizational Strategic Plan, OH 2019
- New North Business Intelligence Strategic Action Plan, WI, 2019
- Mitchell Community Vision and Action Plan, SD, 2019
- Future of Urban Living, Windsor Castle, UK, 2018
- IDNR Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2019
- Tillamook Co. Strategic Action Plan, OR, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO Strategic Action Plan, Washington, D.C., 2019
- Coppell Vision 2040, TX, 2019
- San Diego, OEA Grant Facilitation, CA, 2016-2019
- Snohomish Co Regional Tourism Destination Dev., WA, 2018
- McHenry County College Strategic Foresight, IL, 2018
- NHADEC Strategic Plan, 2018
- Waseca Vision 2030, MN, 2018
- Univ. of Minnesota, Future of Midwest Agriculture, MN, 2017
- City of Edina, Vision Edina, MN, 2015

RECENT PUBLICATIONS

- Greenwood Community Vision, 2025
- Keene 2025 Comprehensive Master Plan, 2025
- Vision Keene Community Vision, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton Comprehensive Economic Strategic Plan, 2024
- PlanKCK Economic Dev. Strategic Plan, 2023
- Smithville School District Strategic Action Plan, 2023
- Greater Mankato Think-Tank Report, 2023
- The Future of Wellbeing in Minnesota, 2022
- Envision East Central Iowa CEDS Plan, 2022
- University City Community Vision 2040, 2022
- Greater Bemidji Strategic Action Plan Report, 2022Town of Falmouth Vision and Values Final Report, 2022
- The Future of Manufacturing in Illinois, 2022
- The Future of Chiropractic, 2021
- Smithville Parks and Recreation Master Plan, 2021
- Middle Georgia Innovation Performance and Gap Analysis Report Part 1: Case Studies, 2021
- Smithville Comprehensive Plan, 2020
- Kinship Fdtn. Future of Local Food Systems & Sust.Ag, 2020
- IDNR Sustainable Materials Management - Vision for Iowa,2019NADO Strategic Action Plan, 2019
- Trotwood Organizational Strategic Plan, 2019
- The Future of Urban Living, 2019
- The Future of Tourism – Maine Woods, 2018
- NHADEC Strategic Action Plan, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017
- The Future of Food, 2016

future→iQ
Create Future Intelligence™
www.future-iq.com

10.5 Brittany Rempe, Creative Director, Future iQ

RÉSUMÉ

brittany@future-iq.com

EDUCATION

Bachelor of Arts in Public Relations - Simpson College, 2015

EMPLOYMENT

Creative Director - Future iQ, 2022-present

Communications Specialist - East Central Iowa Council of Governments 2020-2022

Marketing Communications Coordinator - Herzog Technologies, Inc., 2015-2020

AWARDS/RECOGNITION

Summa Cum Laude

Simpson College Outstanding Senior, Integrated Marketing Communications

LEADERSHIP EXPERIENCE

Photo Editor, Simpsonian

Co-Founder, Smoky Room Films

Alumnae Advisory Council - Pi Beta Phi

future→iQ

Create Future Intelligence™

www.future-iq.com

BRITTANY REMPE B.A. PUBLIC RELATIONS

CREATIVE DIRECTOR

Brittany Rempe is Future iQ's Creative Director. Alongside a degree in Public Relations and nine years in communications and design, Brittany has a love of branding and a creative heart. These combine well with a multi-faceted skillset, including graphic design, photography, videography, copy writing and web design. Brittany uses experience and an imaginative eye to strengthen Future iQ's projects, delighting in the buildout of project identities and accounting for client personality and existing brands. Throughout each project, Brittany offers communications planning, event capture, web design and strong, clear visuals.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023-2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together - Greater Mankato 2040, Minnesota, 2022
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Florida Adventure Network Mapping, Florida, 2022
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- East Central Iowa Council of Governments Comprehensive Economic Development Strategy Update, Iowa, 2022
- The Future of Wellbeing Foresight Project, Minnesota, 2022
- University City Community Vision 2040, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy; New England, USA
- Town of Falmouth Vision and Values; Falmouth, ME
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- Park City Vision 2020, Utah USA

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- University City Community Vision Final Report, 2022

10.6 Tobiloba Adaramati, Data Analyst, Future iQ

RÉSUMÉ

tobiloba@future-iq.com

EDUCATION

B.Tech. (First Class) Degree in Mathematics Education

Federal University of Technology, Minna, 2015 N.C.E Degree in Computer and Mathematics

Federal College of Education (Technical), Akoka, 2011

EMPLOYMENT

Data Analyst. Future iQ

USA and Europe, 2017 – Present

Results Measurement Expert. JMSF Agribusiness, Nigeria, 2018 – Present

CEO. Growth Analytics Consulting Nigeria, 2017 – Present

Monitoring and Evaluation Analyst.

Solina Group, Nigeria, 2016 – 2017

Research Analyst. Solina Group Nigeria, 2015 – 2016

future→iQ

Create **Future Intelligence**™

www.future-iq.com

TOBILOBA ADARAMATI

DATA ANALYST

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

RECENT PROJECT EXPERIENCE

- City of Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- City of Sugar Land Strategic Action Plan, Texas, 2024-2025
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- City of Smithville Visioning, Missouri, 2019
- Edina Medical and Well-Being Destination Strategic Marketing Plan, Minnesota, 2018
- Coppell Vision 2040, Texas, 2018

10.7 Walter Paixao-Cortes, Data Engineer, Future iQ

RÉSUMÉ

walter@future-iq.com

EDUCATION

Doctorate in Computer Science (Bioinformatics/Natural Language Processing)

Pontifical Catholic University of Rio Grande do Sul, 2015 to present

Masters Degree in Computer Science (Bioinformatics)

Pontifical Catholic University of Rio Grande do Sul 2013 – 2015

Bachelors Degree in Computer Science

Pontifical Catholic University of Rio Grande do Sul, 1995 – 2002

EMPLOYMENT

Data Engineer – Future IQ, 2017 – present

Senior Software Engineer – Dell Computers, Brazil, 2000 – present

Software Engineer – Accenture, Brazil, 2003 – 2005

future→iQ

Create Future Intelligence™

www.future-iq.com

WALTER R. PAIXÃO-CÔRTES M.A., B.A.

DATA ENGINEER

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing. Walter has been working with Future iQ since 2017 on every project, turning every survey result into filterable data visualization platforms which ensures clients and stakeholders can view survey results and filter and manipulate them in a meaningful way.

RECENT PROJECT EXPERIENCE

- Pflugerville Strategic Action Plan, Texas, 2025
- Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- Abbeville County Strategic Action Plan, Sourth Carolina, 2024-2025
- LSCOG Strategic Action Plan, South Carolina, 2024
- City of Sugar Land Strategic Action Plan, Texas, 2024
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023- 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Transforming Tomorrow Together - Greater Mankato 2040, 2022-2023
- Florida Adventure Network Mapping, 2022
- Romulus- Our Community, Our Future, Michigan, 2022
- Moab - Tomorrow Together, Utah, 2022
- East Central Iowa Council of Governments, Iowa, 2021-2022
- University City Community Vision 2040, Missouri, 2021-2022
- City of Smithville Transportation Master Plan, Missouri, 2021 - 2022
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, 2019
- New England Regional Defense Industry Collaboration Initiative, New England, 2019-2023
- City of Smithville Visioning and Strategic Action Plan project, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- Snohomish County Regional Tourism Destination Development, WA. 2018
- McHenry County College, Crystal Lake, IL. 2018
- Middle Georgia Charrette and Regional Planning, Georgia. 2018
- Coppell Vision 2040, Coppell, Texas. 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN. 2017-2018
- Hilton Head Island Our Future, South Carolina. 2017-2018

CITY OF LAKE GENEVA, WISCONSIN
RFP FOR STRATEGIC PLANNING SERVICES

OCTOBER 1, 2025
REVISED PROPOSAL

STRATEGIC ACTION PLAN

future→iQ
Create Future Intelligence™

Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

October 1, 2025

David De Angelis
City Administrator
City of Lake Geneva
626 Geneva Street
Lake Geneva, WI 53147

Re: RFP for Strategic Planning Services

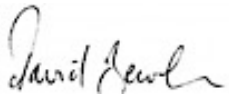
Dear Mr. De Angelis,

Future iQ is pleased to submit this proposal to serve as the consultant team to facilitate the development of the City of Lake Geneva's new five-year Strategic Action Plan.

Our project team delivers personal, innovative, and customized projects. Our hands-on approach, as well as the effectiveness of our methodology, will assist Lake Geneva's stakeholders to achieve an ambitious, realistic and actionable strategic plan. Our goal is to produce original insight, and an agreed-upon, defensible roadmap for the City's future. Future iQ has a strong track record of designing and implementing visioning and strategic planning projects across North America, Europe and Australia. We recently worked with the Cities of Traverse City in Michigan, and Sugar Land in Texas to complete their strategic planning process and are currently completing the development of the Strategic Roadmap for the City of Springfield, Ohio.

It would be our privilege to work with the City of Lake Geneva on this initiative. Please contact me for clarifications. Thank you for your consideration.

Yours sincerely,



David Beurle, CEO
Future iQ, Inc.
Tel: 612-757-9190
Email: david@future-iq.com

TABLE OF CONTENTS

1.0 RELEVANT CONTACT INFORMATION 1

2.0 DESCRIPTION OF THE FIRM 2

3.0 SUMMARY OF THE PROPOSAL 3

4.0 RECOMMENDED PLANNING ACTIVITIES AND ENGAGEMENT 4

4.1 Methodological Approach – Overview 4
4.2 Engagement Plan 5
4.3 Scenario-Based Think-Tank Methodology 8
4.4 Data Visualization 10
4.5 Project Portal and Communications 11

5.0 WORK PLAN & TIMELINE 12

5.1 Proposed Project Timeline 12
5.2 Work Plan Details 13
5.2.1 Phase 1: Initial Planning and Project Set-Up 13
5.2.2 Phase 2: Stakeholder Engagement 14
5.2.3 Phase 3: Plan Development 15

6.0 STAFFING PLAN 16

7.0 REFERENCES 17

8.0 EXAMPLES OF STRATEGIC PLANNING DOCUMENTS 18

8.1 Highlight Strategic Planning Projects 18
8.2 Additional Strategic Planning Projects 20

9.0 PROPOSED COST PROPOSAL 21

10.0 COMPLETE TEAM RESUMES 22

1.0 Relevant Contact Information

Primary Contact:

David Beurle
Chief Executive Officer
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9190
Email: david@future-iq.com
Website : www.future-iq.com

Secondary Contact:

Heather Branigin
Vice President, Foresight Research
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9121
Email: heather@future-iq.com
Website : www.future-iq.com

2.0 Description of the Firm

Future iQ is a small, privately owned global research and consulting company headquartered in Minneapolis, Minnesota. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to our clients. With nine staff members and four strategic partners, Future iQ's clients span North America, Europe, and Australia. Please click on the links in the Snapshot to explore Future iQ's specializations.

Snapshot of Future iQ

Expertise

- City and Urban Planning
- Organizational and Corporate Planning
- Regional Planning
- Tourism Destination Development
- Economic and Workforce Development
- Defense Sector Engagement
- Industry Planning and Analysis

Methodology

- Scenario-Based Strategic Planning and Visioning
- Stakeholder and Community Engagement
- Data Visualization
- Customized Foresight Research
- FutureiQ Mapper – Network & Supply Chain Mapping
- The Future Game
- Future iQ Creative

Foresight Research

- Cities of the Future
- Future of Urban Living
- The Future of Food
- Future of Tourism
- The Next Industrial Revolution
- Future of Manufacturing
- The Future of Wellbeing

For more information, please visit Future iQ's website at:
http://future-iq.com

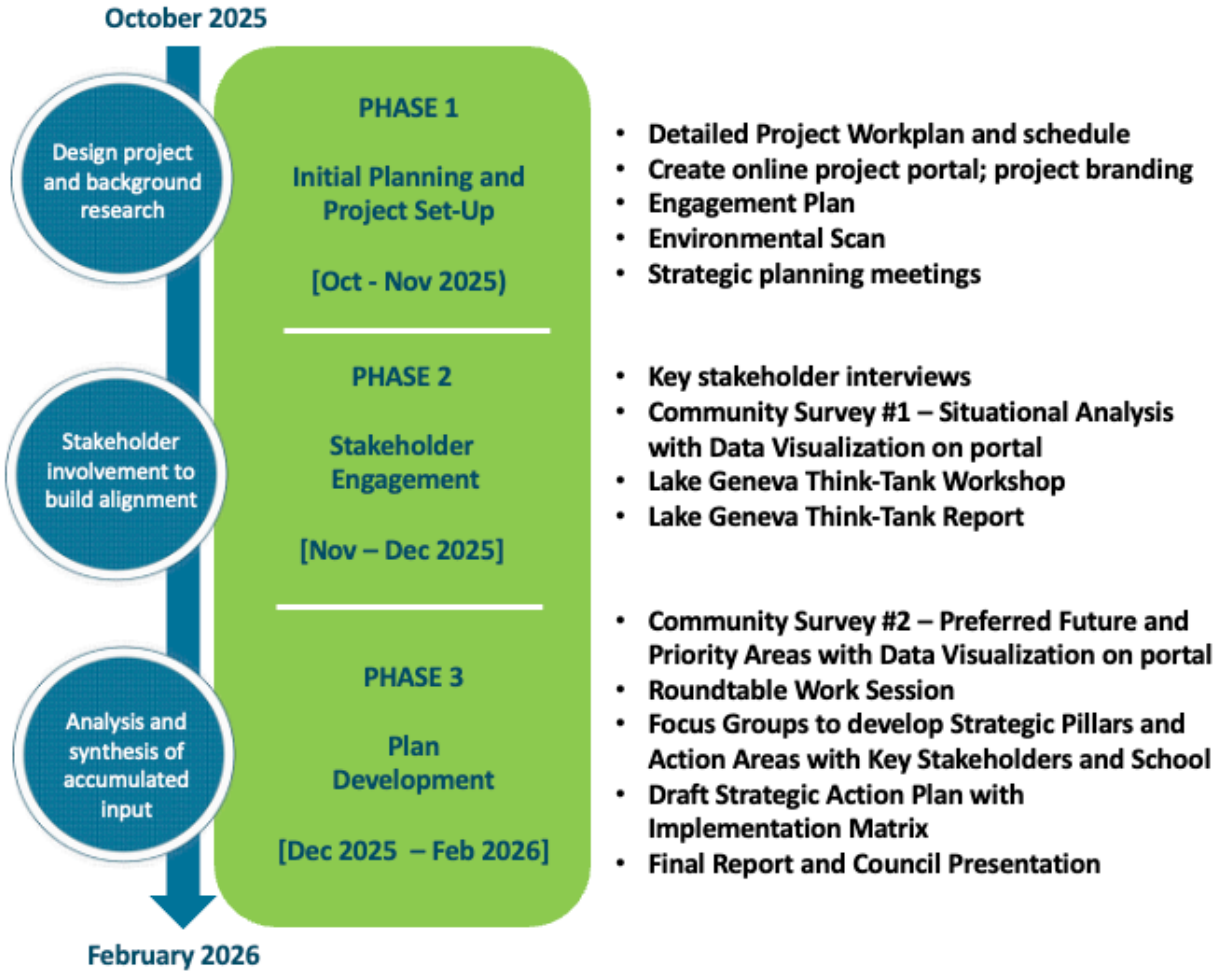
Address:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

Phone:
612.757.9121
Email:
david@future-iq.com

3.0 Summary of the Proposal

The proposed project plan is implemented in three phases that build momentum around a new five-year Strategic Action Plan for the City of Lake Geneva. We understand that the City has undergone several transitions in the last two years and that this is the City's first ever strategic plan. The new Strategic Action Plan is intended to be inclusive and sustainable. It will unify stakeholders, build sustainability and resiliency, and align resources throughout the City. The scope of work will be included in the proposed project plan and incorporated into the three phases outlined below.

Proposed Project Plan

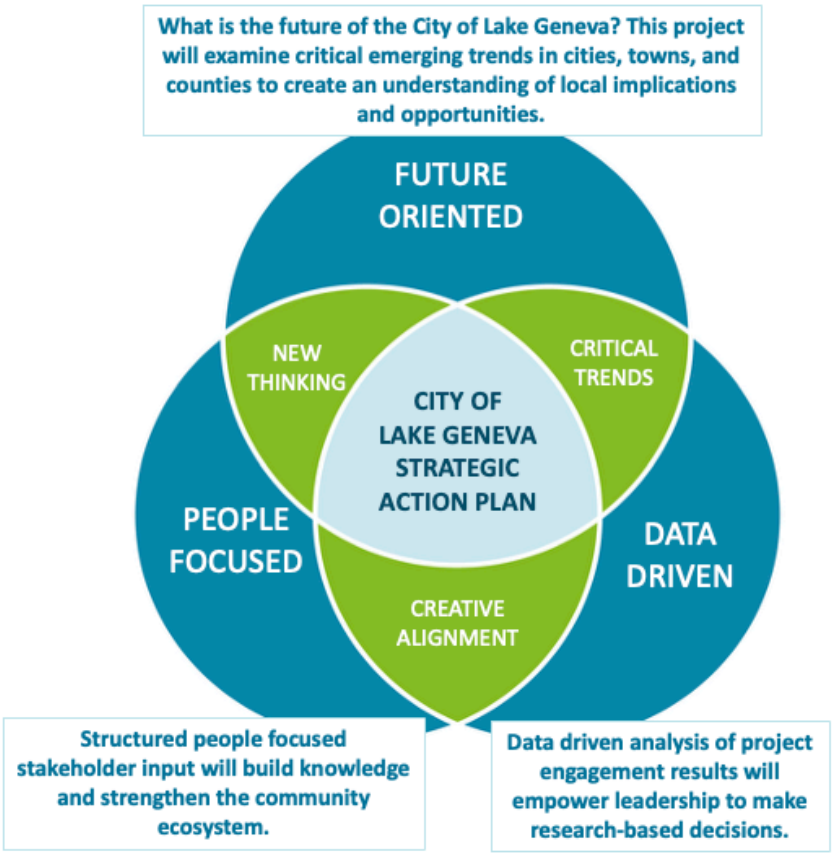


4.0 Recommended Planning Activities and Engagement

4.1 Methodological Approach – Overview

Future iQ brings a global perspective to strategic planning that is invaluable to local interests. For the City of Lake Geneva, this means access to a wealth of knowledge and experience in strategic planning for cities, counties, regions, organizations, and nonprofits. Future iQ will use this experience to guide and inform this project and will work with the Common Council, staff, stakeholders, and community members to develop comprehensive, future-oriented, sustainable, and implementable recommendations to support the new Lake Geneva Strategic Action Plan. The plan will balance priorities across the important dimensions specific to Lake Geneva and incorporate innovative global and local best practices. Future iQ's strategic planning methodology is based on three primary principles:

- **A 'future orientation' principle** is particularly important to take account of rapidly emerging environmental, technological, and societal trends.
- **The 'data driven' principle** ensures the plan is built on solid research and information. Presentation of the quantitative survey and Think-Tank findings are presented using data visualization platform where results can be filtered and viewed in a myriad of ways.
- **The 'people focused' principle** is important to build support for the recommendations, and to harness the best possible input into plan formulation.

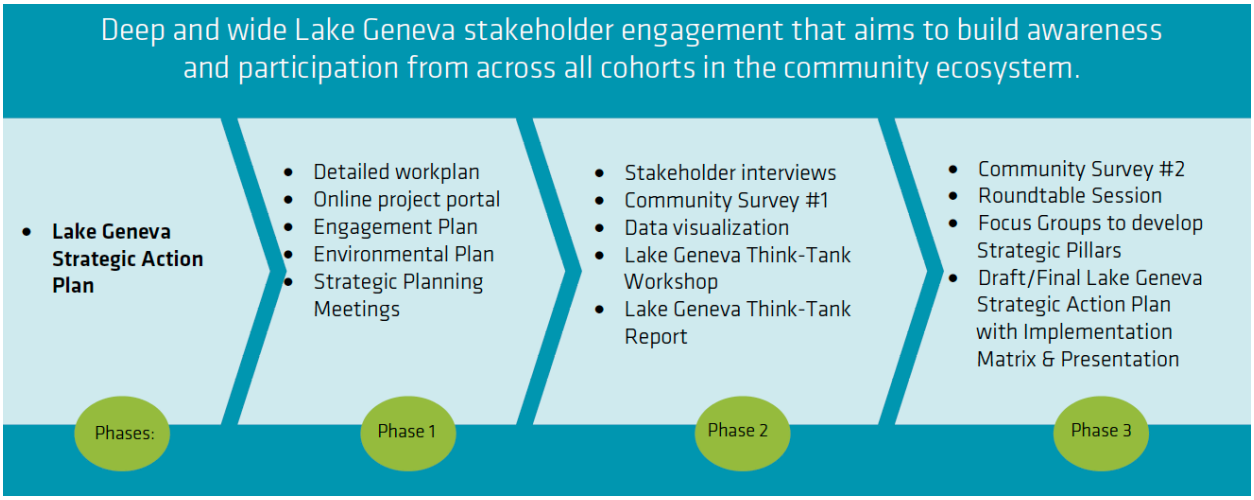


4.2 Engagement Plan

Engagement and transparent communication are cornerstones of Future iQ's strategic planning methodology. Our firm has facilitated strategic planning projects for over 20 years on a global scale, and has led the development of several innovative engagement tools and techniques such as scenario-planning, data visualization, customized foresight research, and The Future Game. We have used our methodologies across multiple settings and have built a reputation for a hands-on, people-focused, and highly customized approach to our projects.

The **Engagement Plan** for this project will be tailored and highly customized to fit the unique needs of the City of Lake Geneva. Future iQ will ensure the strategic planning process is open and accessible to stakeholders, and that multiple opportunities exist to provide input in a variety of formats. We will work closely with Lake Geneva staff to design a variety of engagement and outreach approaches to ensure participation by a broad and deep cross section of the City's community members and stakeholders, including those who don't usually participate in the civic process.

Below is a schematic of the engagement activities that will be included with this project. Additional methodologies may be added throughout the project as needed.



The following two sections outline and highlight the broad range of Future iQ's engagement methodologies and approaches.

PEOPLE-FOCUSED, HANDS-ON ENGAGEMENT METHODOLOGIES

Future iQ maintains a range of innovative proprietary project engagement methodologies. Not all methodologies are used with every project. We tailor the methodologies used to the unique needs of each of our clients.

Methodology	Description	Project Examples
Community and Stakeholder Surveys	Surveys typically gather quantitative and qualitative data that is used to drive our stakeholder data-visualization. Surveys are offered in Spanish and English, hard copy, and digital formats to reach as many cohorts as possible.	• VT Future Forests Stakeholder Survey • Falmouth, ME Community Survey • Littleton, CO Spanish and English Stakeholder Surveys
Listening Sessions & Interviews	These important initial public engagement interactions gather stakeholder input on concerns and aspirations for the future of communities or organizations. Virtual and in-person listening session allow exploration of local issues and concerns.	• University City Community Vision 2040 Listening Sessions • Middle Georgia Innovation Project – stakeholder interviews
Project Portal & Discussion Boards	Project Portals are the 'go to' place for stakeholders to find project information. Discussion Boards are a moderated on-line discussion methodology. These are effective for more complex discussions on topics to creatively explore ideas and issues.	• Future iQ Project Portals • Traverse City, MI Project Portal • Sugar Land, TX Project Portal • Smithville, MO Comprehensive Plan Discussion Boards
Future Game	The Future Game is a unique future planning simulation tool that rewards collaboration, innovation and teamwork. Playing the game allows stakeholders to apply the learning from the game to their own decision making and planning.	• National Congress of American Indians Future Game
Data Visualization	Future iQ's data visualization of survey data on the project portal provides a fun and interactive way to give transparent feedback to stakeholders while at the same time exploring issues of importance.	• Greater Mankato 2040 Data Visualization • Traverse City, MI Data Visualization • Keene, NH Data Visualization
Think-Tank	Think-Tanks are a scenario-based strategic planning methodology. This is very powerful way to create plausible futures and explore concepts of Preferred and Expected Futures. Typically, 50-150 people take a deep dive into future exploration.	• Sugar Land, TX Think-Tank • Romulus, MI Think-Tank • University City, MO Think-Tank • Greenwood, MO Think-Tank • PlanKCK, KS Vision Summit
Vision/Strategy Workshops	Community or Stakeholder Vision and Strategy Workshops take place after the scenario-development at the Think-Tank. The aim of these workshops is to build a deeper understanding of the preferred future and to gather wide input on preliminary strategies.	• Coppell Vision 2040 Community Visioning Workshops • Smithville, MO Community Visioning Workshops
Focus Groups	Future iQ developed a Focus Group methodology that is used to build out the detail of the strategic pillars that are the foundation of a community vision. These are smaller, topic-dedicated expert groups.	• Falmouth Vision and Values Focus Groups • The Future of Wellbeing Focus Group summaries
Future Summits	Future Summits are large scale stakeholder events, that are often capstone events to present project results. Future iQ also utilizes rapid polling and final survey work to gather stakeholder input at these events.	• Greenwood, MO Future Summit • Traverse City, MI Future Summit • Keene, NH Future Summit

PEOPLE-FOCUSED ENGAGEMENT APPROACHES TO STAKEHOLDER COHORTS

Future iQ's people-focused engagement is welcoming and inclusive of all stakeholder cohorts. We strive to include those who don't usually participate in the public process.

Cohort	Approach	Project Examples
Youth	Future iQ strongly supports incorporating the youth voice into visioning and planning processes. We work with high school and university cohorts, recreation groups, and plenary sessions with 500+ students.	• Smithville, MO Youth sessions • Mitchell, SD Youth Sessions & Survey
Seniors	Populations are aging in many communities and as a result, Seniors are an important demographic impacting infrastructural and programmatic community needs. Future iQ seeks out Senior input at living places, Senior Centers, faith centers, Homeowner Associations, etc.	• Park City, UT Senior Center • Wayzata, MN Engagement • Hilton Head Island, SC Engagement
Minority Groups	Significant barriers exist that prevent underrepresented groups from participating in civic processes. Future iQ breaks down these barriers by translating materials and going to gathering places such as faith places, workplaces, multi-cultural and community centers, and community eating places.	• Moab, UT Spanish Speaking Community • Park City, UT Latinos in Action • Coppell, TX Community Fabric • UG Wyandotte County-KCK Vision Summit
Business and Industry	Planning for economic development requires the input from business and industries. Future iQ gathers this important input by facilitating online and in-person focus groups at individual businesses, chambers of commerce, rotary, industry and trade associations events.	• VT Forests Industry Roundtables • Middle Georgia Charrette Process • IMEC Stakeholder Group Sessions • IDNR Industry Focus Group Survey • NERDIC Industry 4.0 Readiness
Working Parents	Future iQ recognizes that working parents are a cohort that is stretched thin with responsibilities. We hold project activities in suitable timeslots, and particularly in the evenings to accommodate this cohort. We also reach out through PTOs, school newsletters, and events.	• University City, MO Evening Sessions • Waseca, MN Engagement Sessions
Young Professionals	We understand that young professionals have very little time for extra activities in their lives. Future iQ goes directly to this cohort through young professional organizations, networking, and training events.	• Middle Georgia Engagement • Moab, UT Young Professionals • Wayzata, MN Engagement
Officials and Community Leaders	Elected officials and community leaders are critical advisors to any project. Future iQ provides information to this cohort through Council briefings and gathers input at City-sponsored and project events, professional conferences, and speaking opportunities.	• Trotwood, OH Fostering Leadership • NADO Training Conference • VT Future Forests Industry Roundtables
General Public	Future iQ provides transparency and multiple avenues for input from the public. We do this through means such as emails, social media, newsletters, open forums, Town Hall meetings, workshops at community centers and libraries.	• University City, MO Community Centers • Mitchell, SD Community Sessions • Falmouth, ME Online Summits

4.3 Scenario-Based Think-Tank Methodology

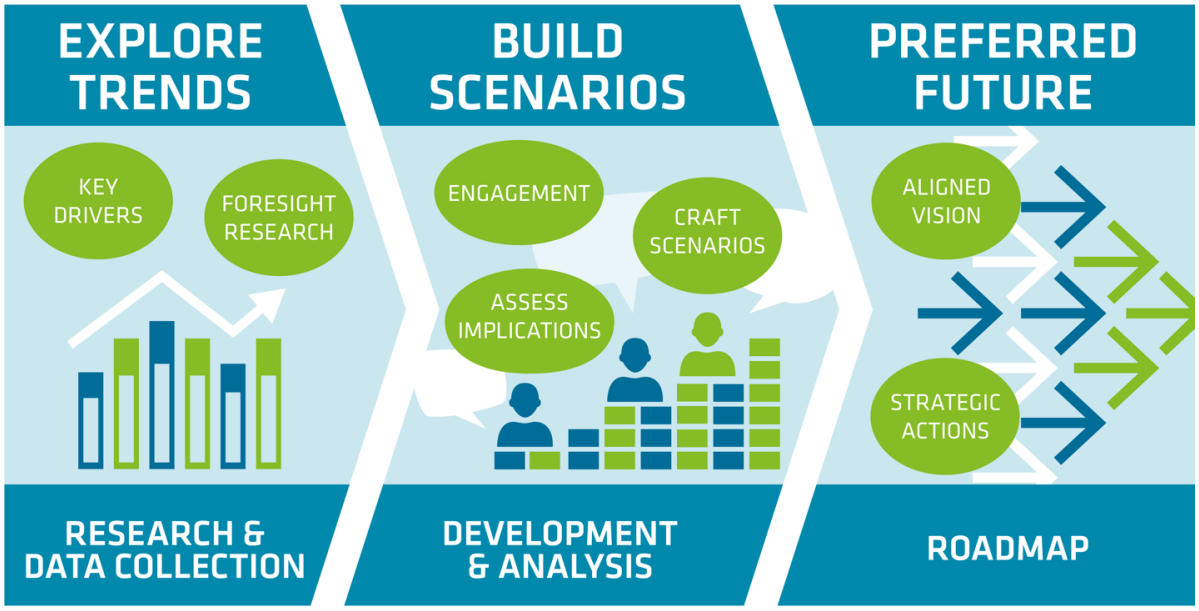
Future iQ uses a scenario planning approach to strategic planning, with a dedicated two-session Think-Tank workshop. The Think-Tank creates scenarios that are not predictions but will, through the Think-Tank process, produce four plausible futures for the City of Lake Geneva. Key aspects and features of the approach include:

- The Think-Tank results will be instrumental to the end of the project. The process is inclusive, easily scalable, and can draw input from all cohorts of the City's community ecosystems.
- It is front loaded with a presentation of key future trends that relate to Lake Geneva and the results from the Community Survey.
- Participants discuss the key drivers that are important to the City's strategic planning process. These key drivers are then ranked with the Think-Tank participants relating to importance and urgency.
- The Scenario Matrix is developed by Future iQ from the first part of the Think-Tank.
- Four plausible scenarios are developed in the later stages of the Think-Tank. This allows stakeholders to visualize different possible futures for Lake Geneva.
- Scenario names and descriptions are described by the Think-Tank participants.
- The expected, preferred, and least desired futures are produced and uploaded to the Lake Geneva project portal.
- The scenario-planning process illustrates the interconnectedness of planning processes and encourages more holistic planning.
- The journey from the expected future to the preferred future is then pursued by building out the steps to get there.

There are several important design principles to the proposed strategic planning approach, including:

- **Strong collaborative and inclusive people-focused approach**. The long-term success of this project will be dependent on building strong collaboration among the City's various stakeholders. The development of this type of 'eco-system' needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for Lake Geneva.
- **Future oriented**. Building a City-wide shared vision will be critical for Lake Geneva. To develop an agreed upon vision and plan, stakeholders will need clarity and a common understanding of the drivers impacting the City's operations.
- **Data driven approach, including data visualization**. Our experience suggests that projects like this are most successful when built on transparent data driven approaches, inclusive of as many stakeholder voices as possible.
- **Project management and communication strategy.** Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.

Below is the visual outline of how Future iQ's scenario-based strategic planning process works.



For Lake Geneva, the Think-Tank process can further examine circumstances including:

- What makes Lake Geneva unique and how can the City use these characteristics to prepare for the future?
- How will stakeholder preferences fit into this vision and how will their evolving demographics be incorporated into the new vision?
- How should funds be invested and leveraged to build resiliency for the City?
- How does Lake Geneva fit into the larger statewide ecosystem?
- What are the specific strategic gap and growth areas for Lake Geneva and does previous planning address those areas?
- How may financial/budgetary issues on the state level impact Lake Geneva and how can the City prepare for potential budget challenges?
- What unique hurdles might the City face, and how do we build collaborative approaches and structures to ensure continued successful programs and services for its community members and stakeholders?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story stakeholders want to tell, and what future do they want for Lake Geneva?

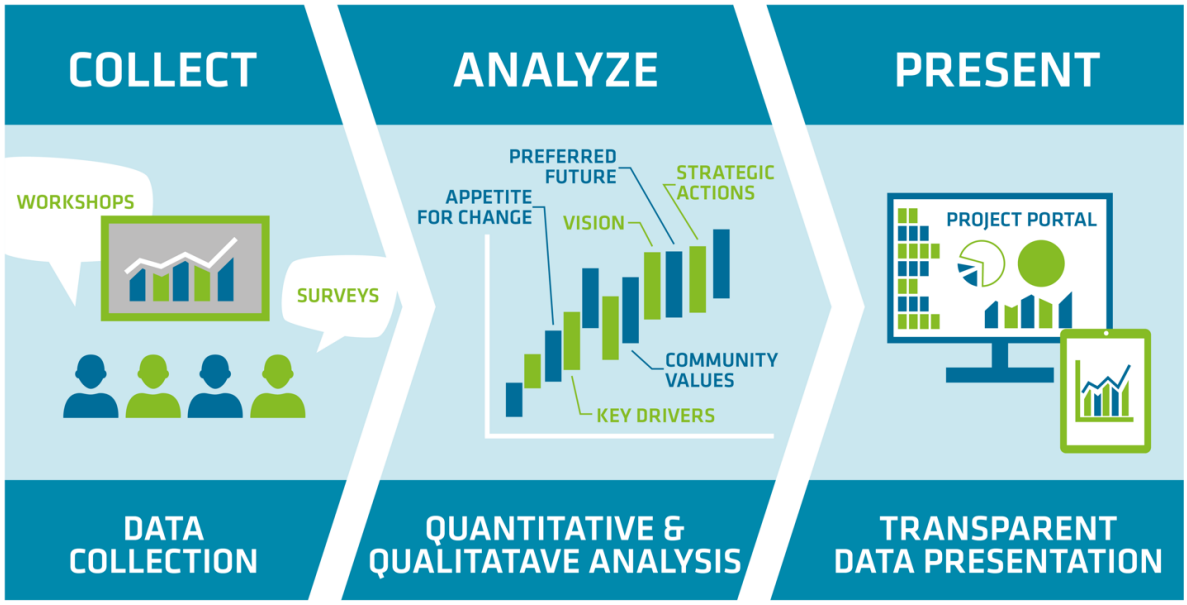
The methodology being proposed by Future iQ in this proposal is more in-depth than a SWOT analysis and will allow community members and stakeholders to tackle these questions in an engaging and thought-provoking manner. Following the Think-Tank, Future iQ will produce an in-depth **Lake Geneva Think-Tank Report**. This will then lead to the clarification of the emerging vision and focus areas that will serve as a foundation for the Lake Geneva Strategic Action Plan.

4.4 Data Visualization

Data visualization allows individual stakeholders to see where they fit into community perspectives.

Data collection and development from surveys provides an inclusive process and a comprehensive understanding of community and stakeholder views and where points of consensus lie. Future iQ will use an online Lab Portal to collect and display community survey results. For examples, please see http://lab.future-iq.com. This approach provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across community ecosystems.

The strategic planning process for Lake Geneva includes surveys that will reach as many community members and stakeholders as possible. Future iQ's data visualization allows viewers to sort and filter the data by cohort group, revealing sentiments by cohort filters such as City affiliation, neighborhood, age, etc. The Lab also serves as a central location where stakeholders can go to find updated project information and notices.

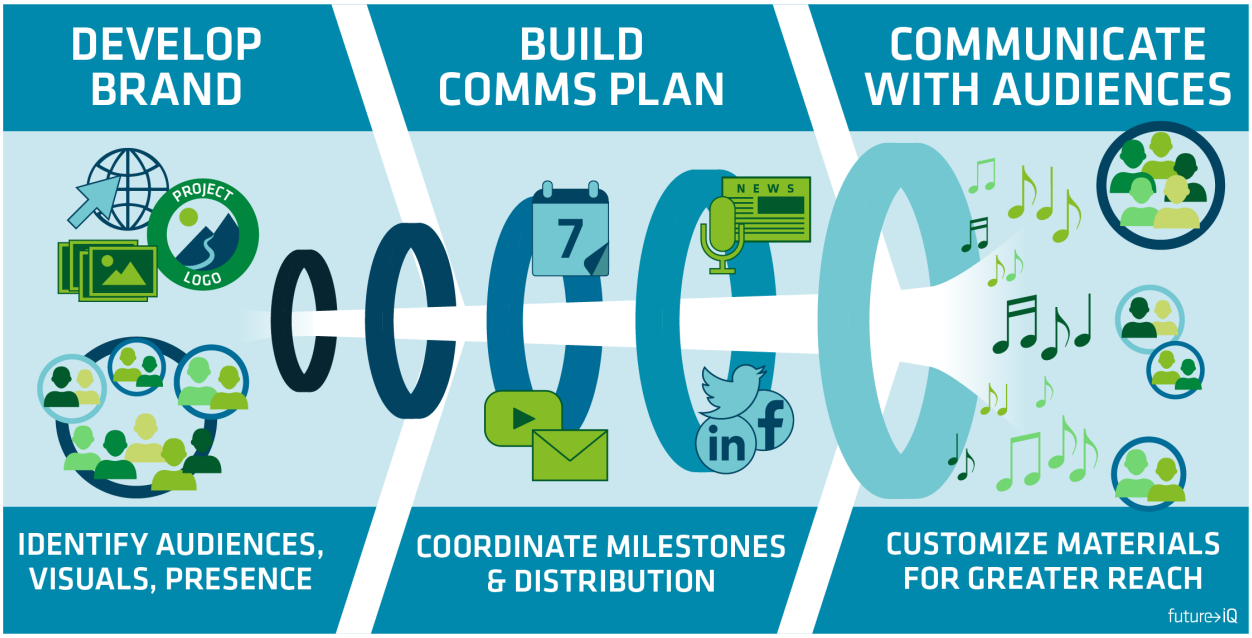


Future iQ prioritizes ensuring our content, analysis, and findings are easy to understand and approachable for all audience types. This helps make sure that our engagement reaches a wide variety of community members and conversations can dive deep regardless of participants' familiarity on the topic. The strategic planning process is an important time for Lake Geneva. By leveraging data visualization and easy-to-follow content, we draw higher participation rates and more meaningful conversations.

4.5 Project Portal and Communications

Communications are integral parts of Future iQ's methodologies. We take care to provide project information to stakeholders that is approachable, accurate, and sensitive to local concerns. Our communications involve both digital and traditional methods to include as broad an audience as possible. We work closely with our clients to maintain regular communications for the duration of the project. It is our experience that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.

A key part of our communications is the distribution of information via the associated customized project portal. The **project portal** serves as a central location where community members and stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. The portal provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across a community ecosystem. Visit lab2.future-iq.com for examples. Note the project portal has a translation feature that may be turned on by users to translate the portal into many languages including Spanish.



5.0 Work Plan & Timeline

5.1 Proposed Project Timeline

The following chart outlines key tasks and suggested periods of activities for this project's Work Plan. This timeline reflects the relative emphasis of activity. Work on several of the key deliverables will occur in parallel to allow the phases to be completed within the project timeline. We will work with Lake Geneva staff to create a timeline that incorporates the specific needs of the City and remains flexible over the course of the project.

Key Phases	Key Deliverables	O	N	D	J	F
Phase 1: Initial Planning and Project Set-Up	Detailed Project Work Plan and schedule					
	Create online project portal; project branding					
	Engagement Plan					
	Environmental Scan					
	Strategic planning meetings					
Phase 2: Stakeholder Engagement	Key stakeholder interviews					
	Community Survey #1 – Situational Analysis with Data Visualization on portal					
	Lake Geneva Think-Tank Workshop					
	Lake Geneva Think-Tank Report					
Phase 3: Plan Development	Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal					
	Roundtable Session with Council and Staff					
	Focus Groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School					
	Draft Lake Geneva Strategic Action Plan with Implementation Matrix					
	Final Report and Council Presentation					
Ongoing	Weekly meetings with client liaison					
	Project portal updates					
	Engagement and Communication Plans ongoing delivery					

5.2 Work Plan Details

The initial planning and project set-up invites participation, creates anticipation, and sets the tone for the planning process.

Future iQ works hard to deliver our projects on-time and on-budget. Below is a detailed description of the three phases of our proposed Work Plan for this project.

5.2.1 Phase 1: Initial Planning and Project Set-Up

This project will begin with meetings with City staff to establish a final **Work Plan and schedule** that provides a detailed explanation of the overall project design and more clearly defines roles, tasks, timelines, and responsibilities throughout the life of the project. Additionally, the project's **Engagement Plan** will be a detailed plan outlining the specific engagement activities to occur throughout the project. The Engagement Plan for this project will be flexible and tailored to fit the broad needs of the City's community members and stakeholders.

To familiarize ourselves with the City environment, the project team will conduct background research consisting of a **review of existing documents** and materials exploring impacting trends and the current City environment and plans. This will be undertaken to understand those strategic directions already established and to identify progress made towards those objectives. This situational analysis will help team members to build a firm understanding of local accomplishments, challenges, goals, and priorities. This information will be compiled into an **Environmental Scan Report** for reference throughout the strategic planning process.

During Phase 1, Future iQ will create a unique project portal. The **project portal** serves as a central location where stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. Communications will involve both digital and traditional methods to reach as broad an audience as possible. This project team will schedule **weekly strategic planning calls** with our City staff contact throughout the duration of the project. It is our firm belief that regular communications keep communication lines open and add to the transparency of the planning process.

Deliverables from Phase 1 will include**:**

- Detailed Project Work Plan and schedule
- Create online project portal; project branding
- Engagement Plan
- Environmental Scan
- Strategic planning meetings

RFP requirements addressed by deliverables in Phase 1:

- Design of an inclusive planning process that involves input from Council members, City Staff, residents, businesses, and input from historical planning efforts such as the Comprehensive Plan.
- Environmental Scan

5.2.2 Phase 2: Stakeholder Engagement

Scenario development will allow stakeholders to explore future planning options and to visualize possible futures for Lake Geneva.

The project team will begin Phase 2 with the launch of a **Community Survey #1** that will analyze stakeholder sentiment and appetite for change and future readiness. The results of the Community Survey will be posted on the project portal using a **data visualization platform**.

Future iQ will also conduct **key stakeholder interviews** with key stakeholders to gather personal insights and thoughts on the current conditions and the future for Lake Geneva. This is intended to provide background information for the project team, and to promote the strategic planning process. This will familiarize stakeholders with the project team and ensure 'buy in' on the strategic planning process from the start.

Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping both rural and urban areas. This future-oriented lens guides Phase 2 as it creates the building blocks of the preferred vision for Lake Geneva using a scenario-based planning methodology. Using trend research and expectations about cities and counties, this methodology will enable stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a two-session in-person **Lake Geneva Think-Tank Workshop.**

The methodology being proposed is more in-depth than a SWOT analysis and will lead to the clarification of a preferred vision and preliminary strategic action areas for the City that will serve as the foundation for the Lake Geneva Strategic Action Plan. The results from the survey and Think-Tank will be compiled in the **Lake Geneva Think-Tank Report** and posted on the project portal.

Deliverables from Phase 2 will include:

- Key stakeholder interviews
- Community Survey #1 – Situational Analysis with Data Visualization on portal
- Lake Geneva Future Think-Tank Workshop
- Lake Geneva Future Think-Tank Report

RFP requirements addressed by deliverables in Phase 2:

- Development of Mission, Vision, and Values Statements.
- SWOT Analysis (Think-Tank).
- Development of initial framework for goals, objectives and strategies for the plan.

5.2.3 Phase 3: Plan Development

The Strategic Action Plan will articulate clear guidance on the steps needed to achieve the preferred future for Lake Geneva.

After the Think-Tank, the project team will then conduct a second **Community Survey** to collect feedback on the Preferred Future and Priority Areas for the Strategic Action Plan. Future iQ will also facilitate a **Roundtable Session** with the Common Council and Staff as well as **Focus Groups** with specified stakeholder groups (including the School) to build out the Strategic Pillars of the Strategic Action Plan. These Focus Groups will explore the goals and actions needed to get to the preferred future for Lake Geneva. The project team will develop action areas for each of the Strategic Pillars in the new Strategic Action Plan.

After the development of the Strategic Pillars and Action Areas at the Focus Groups, Future iQ team members will work closely with Lake Geneva staff to craft a detailed framework for the Strategic Action Plan including a timeline with responsible parties and an **Implementation Matrix** for ongoing monitoring and reporting. This will in involve careful synthesis of all research, engagement results, surveys, reports and analyses. The project team will produce a **draft of the Lake Geneva Strategic Action Plan** and seek input from the Common Council and City Staff. The final draft will provide feedback mechanisms and a systematic approach to future review and adjustments to the plan. The Project Director will present the final Plan to the Common Council and City Staff.

Measuring Effectiveness - Understanding and measuring progress in key performance areas will be an important part of implementing the Lake Geneva Strategic Action Plan. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. Phase 3 of this project plan includes the development of measurements to support periodic review and adjustment of strategic action plan over time.

Deliverables for Phase 3 include:

- Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal
- Roundtable Session with Council and Staff
- Focus Groups with specified stakeholder groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School
- Draft Strategic Action Plan with Implementation Matrix
- Final Report and Council Presentation

RFP requirements addressed by deliverables in Phase 3:

- Final development of goals, objectives and strategies for the Strategic Action Plan.
- Development of timeline, responsible parties and costs in an Implementation Matrix that will identify key performance indicators and allow for monitoring of success and consideration for the next strategic planning process.
- Final Strategic Action Plan document.

6.0 Staffing Plan

The client-facing Future iQ team members presented in this proposal have significant experience working on visioning, strategic planning, and economic development projects in both rural and urban settings. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and/or virtually, and for data analysis and report preparation.

The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning, strategic planning, economic development, and foresight research
- Knowledge and experience with cities, counties, state agencies, municipalities, corporations, regional entities, and non-profit organizations
- Project management, stakeholder engagement, and workshop facilitation
- Communications, graphic design, data visualization, and project branding

Project Director David Beurle will be the primary contact person for this project. Below are the respective team member roles for this project.

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, Facilitation, Strategy Development
Adam Bentley	Research Strategist	Research and strategy development
Celine Beurle	COO, Future iQ	Communications
Heather Branigin	VP, Foresight Research	Project Coordinator, Foresight Research
Brittany Rempe	Creative Director	Graphic design and branding
Tobiloba Adaramati	Data Analyst	Data Analysis
Walter Paixao-Cortes	Data Engineer	Data Visualization

For complete project team resumes, please see **Appendix A.**

7.0 References

Below are four recent references for Future iQ's work on strategic planning. Additional references are available upon request.

City of Traverse City, Michigan (2024-2025) Strategic Action Plan	Elizabeth Vogel City Manager City of Traverse City 400 Boardman Avenue Traverse City, MI 49684 Tel: 231-922-4700 Email: evogel@traversecitymi.gov
City of Romulus, Michigan (2022-2023) Vision Romulus – Our Community, Our Future	Julie A. Wojtylko, CPM Chief of Staff City of Romulus Office of the Mayor Tel: 734-955-4501 Email: jwojtylko@romulusgov.com
City of Smithville, Missouri (2019) Vision and Strategic Action Plan; Smithville Comprehensive Plan (2019-2020) Smithville Parks & Recreation Master Plan (2021) Smithville Transportation Master Plan (2021-2022)	Cynthia Wagner City Administrator City of Smithville Smithville, MO 64089 Tel: 816-532-3897 Email: cwagner@smithvillemo.org
Sugar Land, Texas (2024-2925) Strategic Action Plan	Brittaney P. Sinclair, Assistant Director Strategic and Government Affairs City of Sugar Land 2700 Town Center Blvd N Sugar Land, TX 77479 Tel: 281-302-8885 Email: bsinclair@sugarlandtx.gov

8.0 Examples of Strategic Planning Documents

This project will explore complex issues to develop a forward-thinking strategic plan that unifies, strengthens, and advocates for the City of Lake Geneva in new ways. Examples of our project reports and various foresight research reports can be found on the Future iQ website and on Future iQ's stakeholder Research Laboratory. Please click on the links below to access reports and materials for each strategic planning project.

8.1 Highlight Strategic Planning Projects

- **City of Traverse City, MI** Strategic Action Plan
  This recent project created a strategic plan for Traverse City looking out to 2030. The objective of the strategic planning process is to build on Traverse City's current success and incorporate new actions to maintain this success over the next 5 years. The process involved key stakeholder interviews, two surveys, a Think-Tank, Focus Groups, a Roundtable Session, and a Community Dashboard/Balanced Scorecard.
- **City of Essex Junction, VT** Vision and Strategic Action Plan
  Future iQ recently completed this visioning and strategic planning project. The visioning included transparent, deep and robust community engagement as a focus of the strategic planning process. The Strategic Action Plan defines priorities and will guide decision making over the next five years.
- **City of Romulus, MI** Community Vision and Action Plan
  Romulus is a diverse community situated around the Detroit Metropolitan Airport. Recently completed, this community-wide effort brought the community together through extensive engagement methods to identify a realistic vision for the future of the City. The intention of the process was to create a unified Community Vision plan that would inform decision-making on planning, land use, and policy making for the City.
- **Lorain County, OH** Loraine County Strategic Action Plan
  The Lorain County Board of Commissioners recently embarked on a comprehensive and sustainable 5-year Strategic Action Plan for the County. The objective of this strategic planning project was to build on Lorain County's current success and incorporate new actions to maintain and enhance this success over the next 5 years.
- **City of Sugar Land, TX** Strategic Action Plan
  To continue its current success, the City of Sugar Land aspires to be even more ambitious, innovative, and forward-thinking with a commitment to improvement and a continuation of being a 'Trailblazing' city. The outcome of this process, running July 2024 through January 2025, produced a robust, comprehensive and sustainable Strategic Action Plan.
- **City of Coppell, TX** Community Vision and Strategic Action Plan
  Coppell is a community that has a growing Asian population, currently almost a third of the population. Future iQ worked closely with stakeholders to create a vision and action plan that was welcoming and inclusive of all new community members.
- **City of Pflugerville, TX** Strategic Action Plan
  The strategic planning process for this recent project aimed to build on Pflugerville's current success and incorporate new actions to maintain this success over the next 5 years.

- **City of Smithville, MO** Comprehensive Plan
  Facilitated by Future iQ and JS&A, this original comprehensive planning project was built on the community's visioning and strategic planning process that Future iQ also facilitated. The plan involved the strategic economic development of unique character areas and StoryMaps of each identified area of the City. The strategic pillars that emerged from the original strategic planning process were instrumental building blocks of the Comprehensive Plan. Two areas for further study that emerged from the comprehensive planning process were the need for a Parks and Recreation Master Plan, as well as a Transportation Master Plan.
- **University City, MO** Community Vision and Strategic Roadmap
  Future iQ completed the community visioning and planning for University City, a diverse community with significant economic disparities. Led by a Task Force comprised solely of community members, the roadmap that emerged from this process celebrated the rich diversity of the community and incorporated this strength into its vision for the future.
- **City of Edina, MN** Vision Edina and Nodes and Modes Bridging to Comprehensive Plan
  After facilitating the Edina's strategic visioning process, Future iQ led a bridging planning process that coupled together neighborhood development with multimodal transport connections. The concept guided the city's comprehensive planning process as the community sought to enhance the city's characteristics and community fabric, while at the same time embracing urban renewal and targeted redevelopment.
- **City of Moab, UT** Moab – Tomorrow Together
  Future iQ recently completed the community visioning and strategic planning for the City of Moab. The results of this process set the framework for future land use, economic, social and environmental decisions. A key goal of this process was to help the community articulate tangible and intangible elements that, if lost, would fundamentally change the character of Moab.
- **Park City, UT** Community Vision and Action Plan
  The visioning and strategic action planning for this project engaged approximately 1,700 people in a series of surveys, engagement sessions, focus groups and two key Future Summits. The process was designed to provide an open, inclusive and transparent platform for community members to help create a shared vision and board action plan for Park City.
- **Town of Falmouth, ME** Vision and Values The community of Falmouth developed a Town Vision and Values statement through a robust visioning process prior to embarking on the update of its latest Comprehensive Plan. The engagement process was designed to provide and open, inclusive, and transparent platform for community members to help create a shared community vision and values for the future.
- **City of Mitchell, SD** Community Vision and Strategic Action Plan
  The Forward 2040 project brought the community together with a large-scale visioning and strategic planning process to meet the future challenges facing the community. The work was built on open and transparent public participation and thoughtful and constructive dialogue. The final plan includes a strategic roadmap for community decision-making looking out to 2040.

8.2 Additional Strategic Planning Projects

The majority of Future iQ's experience is working with public agencies and municipalities in the United States. Our national reach enables us to provide clients with insights from cities, counties and organizations in both urban and rural areas. We specialize in visioning and strategic planning and provide highly customized plans that are tailored to each of our clients. Below are additional examples of Future iQ's visioning and strategic planning projects. Work products and project summaries are available in the embedded links below.

- U.S. Department of Defense, Madison F35 Community Connection Project
- New North Inc., WI Business Intelligence Strategic Planning
- Oshkosh Initiative, WI Regional Collaborative Action Plan
- East Central WI Regional Planning Commission, WI Fox Valley Regional Planning
- McHenry County College, IL Strategic Foresight Project
- City of Trotwood, OH Organizational Strategic Plan
- City of Wayzata, MN Wayzata 2040 Community Vision
- B.E.S.T. of Waseca County, MN Community Vision and Strategic Action Plan
- Town of Hilton Head Island, SC Vision and Strategic Action Plan
- City of Keene, NH Vision Keene 20-Forward Comprehensive Master Plan (CMP)
- City of Greenwood, MO Vision Greenwood Comprehensive Master Plan
- Abbeville County, SC Strategic Plan
- Lower Savanah Council of Governments, GA Strategic Action Plan
- Flint Hills Regional Council, KS Sustainability Plan and Roadmap
- Greater Mankato 2040, MN Regional strategic visioning project
- City of Littleton, CO Comprehensive Economic Development Strategic Plan
- UG of Wyandotte County-Kansas City, KS Economic Development Strategy
- State of Vermont, VT Vermont Forest Future Strategic Roadmap
- Iowa Department of Natural Resources, IA Strategic Vision for Iowa
- Denton, TX Comprehensive Solid Waste Management Strategy
- McKinney, TX Solid Waste Management Strategy
- Middle Georgia Creating an Innovation Corridor
- Greater Bemidji, MN Strategic Action Plan Update
- Smithville School District, MO Organizational Strategic Plan
- Greater Lima Region, OH Collaborative Action Plan
- Tillamook County, OR Tourism Investment Strategic Vision Action Plan
- Moosehead Lake Region, ME, Regional Vision and Strategic Action Plan
- Snohomish County, WA Regional Destination Visioning and Planning
- Scott County, MN Visioning and Planning
- Kewaunee County, WI Regional Planning
- National Association of Development Organizations (NADO), DC Strategic Action Plan
- Council of State Community Development Agencies (COSCDA), DC Strategic Action Plan
- New Hampshire Aerospace and Defense Consortium (NHADEC), DC Strategic Action Plan

9.0 Proposed Cost Proposal

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director and all staff. We assume that the City of Lake Geneva will provide venues for workshop sessions and presentations, as required. Please note that our fees and project plan are flexible and easily scalable depending on the needs of Lake Geneva.

Key Phases	Key Deliverables	Core Tasks
Phase 1: Initial Planning and Project Kickoff	• Detailed work plan and schedule • Create online project lab portal; project branding • Engagement Plan • Environmental Scan • Strategic planning meetings	$0 $2,000 $1,000 $1,000 $2,000 $1,000
Phase 2: Community Engagement	• Key stakeholder interviews • Community Survey #1 – Situational Analysis with Data Visualization on portal • Lake Geneva Think-Tank Workshop • Lake Geneva Think-Tank Report	$2,000 $4,000 $7,000 $2,000
Phase 3: Plan Development	• Community Survey #2 – Preferred Future and Priority Areas with Data Visualization on portal • Roundtable Session with Council and Staff • Focus Groups to develop Strategic Pillars and Action Areas with Key Stakeholders and School • Draft Lake Geneva Strategic Action Plan with Implementation Matrix • Final Report and Council Presentation	$4,000 $3,000 $8,000 $6,000 $2,000
TOTAL	**FIXED PRICE PROPOSAL**	**$45,000**

Includes ongoing project management work, including weekly/bi-weekly meetings with client liaison, Board meetings, project portal updates and management to a detailed work plan.

Proposed payment schedule:

- 25% on signing of contract
- 25% on completion of Phase 1
- 25% on completion of Phase 2
- 25% on completion of Phase 3

10.0 Complete Team Resumes

10.1 Project Director, David Beurle, CEO, Future iQ

RÉSUMÉ

david@future-iq.com

David Beurle is a world-renowned strategist, futurist, researcher and practitioner. As founder and CEO of Future iQ, David is a pioneer and expert in creating new and innovative future planning approaches for use in community, regional, industry, organizational and government settings. David has pioneered the application of scenario planning within regions, industry and corporations around the world. David created the Future Game™, a global planning and workshop tool that has been used in over 600 workshops across 10 countries. As CEO of Future iQ, David has led global projects across 4 continents and has written a number of foresight papers: future-iq.com/foresight-research.

Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has the major role in all of Future iQ's projects as lead project manager. More details on David's work can be seen at davidbeurle.com.

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder & CEO Future iQ, USA & Europe, 2003 – Present

Principal Adviser, Minister for Primary Industries, Western Australia, 1991 – 2000

Rangeland Scientist, Western Australian Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

Founding member, Plant-Based Product Council, USA, 2019

future→iQ

Create **Future Intelligence**™

www.future-iq.com

DAVID BEURLE B.SC. AGR

CHIEF EXECUTIVE OFFICER

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023 – 2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- COSCDA Strategic Action Plan, Washington DC, 2023 – 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Littleton Comprehensive Economic Development Strategy, Colorado, 2023
- Unified Government Economic Development Strategic Plan, Kansas, 2023
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together – Greater Mankato 2040, Minnesota, 2022-2023
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Smithville Schools District Strategic Plan, Missouri, 2023
- Florida Network Mapping, Florida, 2022
- Vision Romulus, Our Community, Our Future, Michigan, 2022
- Transforming Together Tomorrow - Greater Mankato, Minnesota, 2022
- Moab - Tomorrow Together, Utah, 2022
- The Future of Well Being Foresight Project, Minnesota, 2021-2022
- Envision East Central Iowa, Iowa, 2021-2022
- University City Community Vision, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy, New England, 2021-2022
- City of Smithville Transportation Plan, Missouri, 2021-2022
- Town of Falmouth Vision & Values, Maine, 2020-2021
- The Middle Georgia Innovation Project, Georgia, 2020-2021
- City of Smithville Comprehensive Plan, Missouri, 2020
- Park City Community Vision & Strategic Action Plan, UT, 2019-2020
- NOHOA Community Survey 2019-2020
- ECC Medical/Well-Being Strategic Marketing Plan & Economic Development Plan, Minnesota, 2016-2019
- Tillamook County Strategic Vision & Action Plan, Oregan, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Future of Urban Living Think Tank, St Georges House, Windsor Castle,UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017-2018
- City of Coppell, TX, Community Visioning, 2018-2019
- Maine Woods, Tourism Impact Study, 2017-2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016-2018
- North Coast, Oregon, Tourism Destination Management, 2018-2019
- New Hampshire Aerospace & Defense Consortium, Strategic Action Plan, 2017-2018
- Hilton Head Island, South Carolina, Community Visioning Project, 2016-2017
- University of MN, Future of Midwest Agriculture, 2016-2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015-2017

RECENT PUBLICATIONS

- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- The Future of Manufacturing in Illinois, 2022
- Envision East Central Iowa Final Report, 2022
- University City Community Vision Final Report, 2022
- Town of Falmouth Vision & Values Final Report, 2022
- The Middle Georgia Innovation Corridor Report, 2021
- City of Smithville Parks & Recreation Master Plan, 2021
- The Holding Space: A Guide for Partners in Tribal Research, 2020
- The Future of Urban Living, 2019
- The Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017-2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015

RECENT KEYNOTE PRESENTATIONS

- County Commissioners Association of Ohio Summer Symposium, August 2024
- SMART Manufacturing Conference, Pennsylvania, October 2022
- ITB Berlin Travel Trade Show, Berlin, March 2022
- The Mahoosuc Way Summit, Maine, February 2022
- Aggregate Producers of Wisconsin Annual Convention, Wisconsin, December 2021
- Ohio Food Summit, Ohio, USA, March 2020
- Greater Mankato Annual Summit, Minnesota, USA, March 2020
- New North Regional Summit, Wisconsin, USA, December 2019
- New Hampshire PTAC Conference, NH, USA, December 2019
- Institute of Directors (IoD) Annual Conference, Gleneagles, Scotland, October 2019
- E.P.I.R.C Manufacturing Conference, PA, USA, October 2019
- City of Smithville Youth, Missouri, USA, September 2019
- AgFutures 2035 Conference, Perth, Australia, August 2019
- Agricultural Symposium keynote, Emmetsburg, Iowa, USA, March 2019
- Wisconsin Integrated Resource Management Conference, Stevens Point, Wisconsin, USA, February 2019
- The Future of Urban Living Consultation, St George's House, Windsor Castle, UK, December 2018

10.2 Adam Bentley, Research Strategist, Future iQ

RÉSUMÉ

adam@future-iq.com

EDUCATION

Bachelor of Arts in Political Science, University of Northern Iowa

Master of Public Policy, University of Northern Iowa

Master of Business Administration, Texas A&M-Commerce

EMPLOYMENT

Senior Planner/Economic Development Specialist - East Central Iowa Council of Governments, 2019-2022

Assistant Village Administrator - Waunakee, WI, 2016-2019

Adjunct Faculty - Buena Vista University, 2016-Present

Assistant City Manager - Manhattan, Kansas, 2013-2014

Administrative Assistant to the City Manager - Iowa City, IA, 2011-2013,

Management Fellow, Wichita, KS, 2010-2011

AWARDS / CERTIFICATIONS

Young Professional of the Year 2019- Waunakee Chamber of Commerce

International City/County Management Association (ICMA) Essential Management Skills Certificate

Heartland Economic Development Course (HEDC) Certified

future→iQ

Create **Future Intelligence**™

www.future-iq.com

ADAM BENTLEY B.A., M.P.P., M.B.A.

RESEARCH STRATEGIST

Adam Bentley works for Future iQ as Research Strategist. Adam's background includes experiences working with local and regional governments across the American Midwest. He has a broad background which includes government administration, economic development, strategic planning, human resources, and grant writing. Adam holds a master's degree in public policy from the University of Northern Iowa and a master's degree in business administration from Texas A&M-Commerce. He also serves as an adjunct faculty member for Buena Vista University teaching courses in government, management, and liberal arts.

Adam has a passion for public service and continues to volunteer in local city and non-profit organizations to help improve his community.

RECENT PROJECT EXPERIENCE

- Traverse City Strategic Action Plan, Michigan, 2024 - 2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- Cornell College Strategic Roadmap Development, Iowa, 2023

RELEVANT PUBLICATIONS

- Madison F35 Community Connections Situational Analysis, 2024
- Lorain County Strategic Action Plan Benchmark Report, 2024
- City of Essex Junction Benchmark Report, 2024
- City of Cornell Strategic Roadmap Development Think-Tank Report, 2023

10.3 Celine Beurle, COO, Future iQ

RÉSUMÉ

celine@future-iq.com

EDUCATION

Masters Degree in Sociology

University College Cork, 1998

B.A. Hons Degree in Sociology/ Philosophy

University College Cork, 1996

B.A. Hons Degree Sociology

University of Warwick, 1995

EMPLOYMENT

C.O.O. Future iQ

USA and Europe, 2012 – Present

Managing Director Future iQ Europe, Ltd

Europe, 2012 - Present

Manager, Govt. Employment Service

Ireland, 2003 – 2012

Animal Welfare Policy Chair

Green Party Ireland, 2003 – 2009

future→iQ

Create **Future Intelligence**™

www.future-iq.com

CELINE BEURLE B.A., M.A.

CHIEF OPERATING OFFICER

Celine Beurle is Chief Operating Officer (COO) of Future iQ. Celine is the key project co-ordinator within Future iQ and works as the main point person from Future iQ with clients on the co-ordination and details of many of the larger projects from start to finish.

As Joint Owner and Managing Director of Future iQ, Celine has expanded the company since 2012 across Europe (including South America, Italy, Spain, Portugal and the UK). Celine had an academic background to Masters level in both Sociology and Philosophy. As Future iQ's COO, Celine works with the CEO on the overall strategic direction of Future iQ. The academic background that Celine has excelled in, has enabled her to provide the often needed "societal lens" for many of Future iQ's projects.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024 -2025
- Lorain County Strategic Action Plan Task Force and Actions, Ohio, 2024
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Cornell College Strategic Roadmap Development, Iowa, 2023
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Park City Vision 2020, Utah, 2019-2020
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charrette and Regional Planning Initiative, Georgia, 2018
- Coppell Vision 2040,Texas, 2018
- Hilton Head Island Visioning, South Carolina, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, 2016-2017
  Griffith Foods Scenario Planning, Chicago, USA, 2016
- Mediterranean PORTS EU Projects, Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, 2014-2015
- Australian Grain Research and Development Corporation, Western Australia, 2008-2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- LSCOG Strategic Action Plan Think-Tank Report, 2024
- City of Sugar Land Strategic Action Plan Think-Tank Report, 2024
- City of Essex Junction Strategic Action Plan, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- Lorain County Strategic Action Plan, 2024
- City of Essex Junction Think-Tank Report, 2023
- Cornell College Strategic Roadmap Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- Moab - Tomorrow Together Think-Tank Report, 2022
- Park City Vision 2020 Final Vision and Strategic Action Report, 2021
- Middle Georgia Innovation Framework and Ecosystem Report, 2021
- Middle Georgia Innovation Roadmap Report, 2021
- Middle Georgia Innovation Corridor Report, 2021
- Park City Vision 2020 Think-Tank Report, 2019
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- Future iQ Project Communication Plan - Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Monterspertoli Scenario Planning Report, 2014

10.4 Heather Branigin, Vice President, Foresight Research, Future iQ

RÉSUMÉ

heather@future-iq.com

EDUCATION

Master of Arts in Teaching
Secondary Level, Social Studies

University of St. Thomas, MN
Bachelor of Arts in Political Science/ International Relations
Advanced Language Certificate: French Literature
Carleton College, MN
Honours Degree, Neuchâtel Jr. College, Neuchâtel, Switzerland

EMPLOYMENT

Vice President, Foresight Research, Future iQ, 2016-present
City of Edina, MN, 2013-2016
NCCA-National Model United Nations, Minneapolis, MN, 2010-2013
UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Volunteer Judge, Future City Competition, 2017

Co-President (2011-2013); Board Member (2010, 2014) UNA-MN

Board Member and Secretary, Caring for Cats, 2019-2021

Advisory Council Member, UNA-MN, 2014-present

future→iQ
Create Future Intelligence™
www.future-iq.com

HEATHER BRANIGIN B.A., M.A.T.

VICE PRESIDENT, FORESIGHT RESEARCH

Heather leads Future iQ's research projects and proposal writing, most recently co-authoring The Future of Wellbeing and The Future of Urban Living. She has extensive experience in local government and the nonprofit sector and is an accomplished project manager. Heather has a well-developed ability to assimilate information into thoughtful and coherent report and proposal writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather provides critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerated change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE

- Jasper Comprehensive Plan, IN 2025-2026
- NH Community Dev. Finance Authority Community Dev. Block Grant (CDBG) Update, 2025
- Greenwood Comprehensive Master Plan, MO, 2024-2025
- Keene Comprehensive Master Plan, NH 2024-2025
- Pflugerville Strategic Action Plan, TX 2025
- Sugar Land Strategic Action Plan, TX, 2025
- COSCDA Strategic Action Plan and Implementation Assistance, Washington, DC, 2023-2025
- Littleton Comprehensive Economic Development Strategy, CO, 2023-2024
- Unified Government of WYCO-KCK Economic Development Strategic Plan, KS 2023
- MN Dept. of HHS, Age-Friendly MN TAP Grant, 2023-2026
- Smithville School District Strategic Action Plan, MO, 2022-2023
- The Future of Wellbeing, MN, 2022
- Transforming Tomorrow Together - Greater Mankato 2030, MN, 2022-2024
- University City Community Vision 2040 Strategic Roadmap, MO, 2022
- ECICOG Comprehensive Economic Development Strategy, IA, 2022
- Falmouth Vision and Values, ME, 2022
- Greater Bemidji Strategic Action Plan Update, MN, 2022
- IMEC Future of Manufacturing in Illinois, 2022
- The Middle Georgia Innovation Project, 2021
- Smithville Parks & Rec Master Plan 2030, MO, 2021
- Denton Comp. Solid Waste Management Strategy, TX, 2021
- The Future of Chiropractic Strategic Visioning, OR 2021
- Smithville Comprehensive Plan, MO, 2020
- Kinship Fellows and Food: Land: Opp. Grantees Summit, IL, 2020
- Trotwood Organizational Strategic Plan, OH 2019
- New North Business Intelligence Strategic Action Plan, WI, 2019
- Mitchell Community Vision and Action Plan, SD, 2019
- Future of Urban Living, Windsor Castle, UK, 2018
- IDNR Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2019
- Tillamook Co. Strategic Action Plan, OR, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO Strategic Action Plan, Washington, D.C., 2019
- Coppell Vision 2040, TX, 2019
- San Diego, OEA Grant Facilitation, CA, 2016-2019
- Snohomish Co Regional Tourism Destination Dev., WA, 2018
- McHenry County College Strategic Foresight, IL, 2018
- NHADEC Strategic Plan, 2018
- Waseca Vision 2030, MN, 2018
- Univ. of Minnesota, Future of Midwest Agriculture, MN, 2017
- City of Edina, Vision Edina, MN, 2015

RECENT PUBLICATIONS

- Greenwood Community Vision, 2025
- Keene 2025 Comprehensive Master Plan, 2025
- Vision Keene Community Vision, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton Comprehensive Economic Strategic Plan, 2024
- PlanKCK Economic Dev. Strategic Plan, 2023
- Smithville School District Strategic Action Plan, 2023
- Greater Mankato Think-Tank Report, 2023
- The Future of Wellbeing in Minnesota, 2022
- Envision East Central Iowa CEDS Plan, 2022
- University City Community Vision 2040, 2022
- Greater Bemidji Strategic Action Plan Report, 2022Town of Falmouth Vision and Values Final Report, 2022
- The Future of Manufacturing in Illinois, 2022
- The Future of Chiropractic, 2021
- Smithville Parks and Recreation Master Plan, 2021
- Middle Georgia Innovation Performance and Gap Analysis Report Part 1: Case Studies, 2021
- Smithville Comprehensive Plan, 2020
- Kinship Fdtn. Future of Local Food Systems & Sust.Ag, 2020
- IDNR Sustainable Materials Management - Vision for Iowa,2019NADO Strategic Action Plan, 2019
- Trotwood Organizational Strategic Plan, 2019
- The Future of Urban Living, 2019
- The Future of Tourism – Maine Woods, 2018
- NHADEC Strategic Action Plan, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017
- The Future of Food, 2016

10.5 Brittany Rempe, Creative Director, Future iQ

RÉSUMÉ

brittany@future-iq.com

EDUCATION

Bachelor of Arts in Public Relations - Simpson College, 2015

EMPLOYMENT

Creative Director - Future iQ, 2022-present

Communications Specialist - East Central Iowa Council of Governments 2020-2022

Marketing Communications Coordinator - Herzog Technologies, Inc., 2015-2020

AWARDS/RECOGNITION

Summa Cum Laude

Simpson College Outstanding Senior, Integrated Marketing Communications

LEADERSHIP EXPERIENCE

Photo Editor, Simpsonian

Co-Founder, Smoky Room Films

Alumnae Advisory Council - Pi Beta Phi

future→iQ

Create **Future Intelligence**™

www.future-iq.com

BRITTANY REMPE B.A. PUBLIC RELATIONS

CREATIVE DIRECTOR

Brittany Rempe is Future iQ's Creative Director. Alongside a degree in Public Relations and nine years in communications and design, Brittany has a love of branding and a creative heart. These combine well with a multi-faceted skillset, including graphic design, photography, videography, copy writing and web design. Brittany uses experience and an imaginative eye to strengthen Future iQ's projects, delighting in the buildout of project identities and accounting for client personality and existing brands. Throughout each project, Brittany offers communications planning, event capture, web design and strong, clear visuals.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023-2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together - Greater Mankato 2040, Minnesota, 2022
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Florida Adventure Network Mapping, Florida, 2022
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- East Central Iowa Council of Governments Comprehensive Economic Development Strategy Update, Iowa, 2022
- The Future of Wellbeing Foresight Project, Minnesota, 2022
- University City Community Vision 2040, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy; New England, USA
- Town of Falmouth Vision and Values; Falmouth, ME
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- Park City Vision 2020, Utah USA

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- University City Community Vision Final Report, 2022

10.6 Tobiloba Adaramati, Data Analyst, Future iQ

RÉSUMÉ

tobiloba@future-iq.com

EDUCATION

B.Tech. (First Class) Degree in Mathematics Education

Federal University of Technology, Minna, 2015 N.C.E Degree in Computer and Mathematics

Federal College of Education (Technical), Akoka, 2011

EMPLOYMENT

Data Analyst. Future iQ

USA and Europe, 2017 – Present

Results Measurement Expert. JMSF Agribusiness, Nigeria, 2018 – Present

CEO. Growth Analytics Consulting Nigeria, 2017 – Present

Monitoring and Evaluation Analyst.

Solina Group, Nigeria, 2016 – 2017

Research Analyst. Solina Group Nigeria, 2015 – 2016

future→iQ
Create **Future Intelligence**™
www.future-iq.com

TOBILOBA ADARAMATI

DATA ANALYST

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

RECENT PROJECT EXPERIENCE

- City of Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- City of Sugar Land Strategic Action Plan, Texas, 2024-2025
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- City of Smithville Visioning, Missouri, 2019
- Edina Medical and Well-Being Destination Strategic Marketing Plan, Minnesota, 2018
- Coppell Vision 2040, Texas, 2018

10.7 Walter Paixao-Cortes, Data Engineer, Future iQ

RÉSUMÉ

walter@future-iq.com

WALTER R. PAIXÃO-CÔRTES M.A., B.A.

DATA ENGINEER

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing. Walter has been working with Future iQ since 2017 on every project, turning every survey result into filterable data visualization platforms which ensures clients and stakeholders can view survey results and filter and manipulate them in a meaningful way.

EDUCATION

Doctorate in Computer Science (Bioinformatics/Natural Language Processing)

Pontifical Catholic University of Rio Grande do Sul, 2015 to present

Masters Degree in Computer Science (Bioinformatics)

Pontifical Catholic University of Rio Grande do Sul 2013 – 2015

Bachelors Degree in Computer Science

Pontifical Catholic University of Rio Grande do Sul, 1995 – 2002

EMPLOYMENT

Data Engineer – Future IQ, 2017 – present

Senior Software Engineer – Dell Computers, Brazil, 2000 – present

Software Engineer – Accenture, Brazil, 2003 – 2005

RECENT PROJECT EXPERIENCE

- Pflugerville Strategic Action Plan, Texas, 2025
- Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- Abbeville County Strategic Action Plan, Sourth Carolina, 2024-2025
- LSCOG Strategic Action Plan, South Carolina, 2024
- City of Sugar Land Strategic Action Plan, Texas, 2024
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023- 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Transforming Tomorrow Together - Greater Mankato 2040, 2022-2023
- Florida Adventure Network Mapping, 2022
- Romulus- Our Community, Our Future, Michigan, 2022
- Moab - Tomorrow Together, Utah, 2022
- East Central Iowa Council of Governments, Iowa, 2021-2022
- University City Community Vision 2040, Missouri, 2021-2022
- City of Smithville Transportation Master Plan, Missouri, 2021 - 2022
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, 2019
- New England Regional Defense Industry Collaboration Initiative, New England, 2019-2023
- City of Smithville Visioning and Strategic Action Plan project, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- Snohomish County Regional Tourism Destination Development, WA. 2018
- McHenry County College, Crystal Lake, IL. 2018
- Middle Georgia Charrette and Regional Planning, Georgia. 2018
- Coppell Vision 2040, Coppell, Texas. 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN. 2017-2018
- Hilton Head Island Our Future, South Carolina. 2017-2018

future→iQ
Create Future Intelligence™
www.future-iq.com

CITY OF LAKE GENEVA, WISCONSIN
RFP FOR STRATEGIC PLANNING SERVICES

AUGUST 27, 2025
PROPOSAL

STRATEGIC ACTION PLAN

future→iQ
Create Future Intelligence™

Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

August 27, 2025

David De Angelis
City Administrator
City of Lake Geneva
626 Geneva Street
Lake Geneva, WI 53147

Re: RFP for Strategic Planning Services

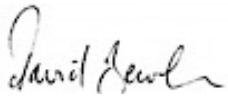
Dear Mr. De Angelis,

Future iQ is pleased to submit this proposal to serve as the consultant team to facilitate the development of the City of Lake Geneva's new five-year Strategic Action Plan.

Our project team delivers personal, innovative, and customized projects. Our hands-on approach, as well as the effectiveness of our methodology, will assist Lake Geneva's stakeholders to achieve an ambitious, realistic and actionable strategic plan. Our goal is to produce original insight, and an agreed-upon, defensible roadmap for the City's future. Future iQ has a strong track record of designing and implementing visioning and strategic planning projects across North America, Europe and Australia. We recently worked with the Cities of Traverse City in Michigan, and Sugar Land in Texas to complete their strategic planning process and are currently completing the development of the Strategic Action Plan for Abbeville County in South Carolina.

It would be our privilege to work with the City of Lake Geneva on this initiative. Please contact me for clarifications. Thank you for your consideration.

Yours sincerely,



David Beurle, CEO
Future iQ, Inc.
Tel: 612-757-9190
Email: david@future-iq.com

TABLE OF CONTENTS

1.0 RELEVANT CONTACT INFORMATION 1

2.0 DESCRIPTION OF THE FIRM 2

3.0 SUMMARY OF THE PROPOSAL 3

4.0 RECOMMENDED PLANNING ACTIVITIES AND ENGAGEMENT 4

4.1 Methodological Approach – Overview 4
4.2 Engagement Plan 5
4.3 Scenario-Based Think-Tank Methodology 8
4.4 Data Visualization 10
4.5 Project Portal and Communications 11

5.0 WORK PLAN & TIMELINE 12

5.1 Proposed Project Timeline 12
5.2 Work Plan Details 13
5.2.1 Phase 1: Initial Planning and Project Set-Up 13
5.2.2 Phase 2: Stakeholder Engagement 14
5.2.3 Phase 3: Plan Development 15

6.0 STAFFING PLAN 16

7.0 REFERENCES 17

8.0 EXAMPLES OF STRATEGIC PLANNING DOCUMENTS 18

8.1 Highlight Strategic Planning Projects 18
8.2 Additional Strategic Planning Projects 20

9.0 COMPLETE TEAM RESUMES 21

1.0 Relevant Contact Information

Primary Contact:

David Beurle
Chief Executive Officer
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9190
Email: david@future-iq.com
Website : www.future-iq.com

Secondary Contact:

Heather Branigin
Vice President, Foresight Research
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
Tel: 612-757-9121
Email: heather@future-iq.com
Website : www.future-iq.com

2.0 Description of the Firm

Future iQ is a small, privately owned global research and consulting company headquartered in Minneapolis, Minnesota. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to our clients. With nine staff members and four strategic partners, Future iQ's clients span North America, Europe, and Australia. Please click on the links in the Snapshot to explore Future iQ's specializations.

Snapshot of Future iQ

Expertise

- City and Urban Planning
- Organizational and Corporate Planning
- Regional Planning
- Tourism Destination Development
- Economic and Workforce Development
- Defense Sector Engagement
- Industry Planning and Analysis

Methodology

- Scenario-Based Strategic Planning and Visioning
- Stakeholder and Community Engagement
- Data Visualization
- Customized Foresight Research
- FutureiQ Mapper – Network & Supply Chain Mapping
- The Future Game
- Future iQ Creative

Foresight Research

- Cities of the Future
- Future of Urban Living
- The Future of Food
- Future of Tourism
- The Next Industrial Revolution
- Future of Manufacturing
- The Future of Wellbeing

For more information, please visit Future iQ's website at:
http://future-iq.com

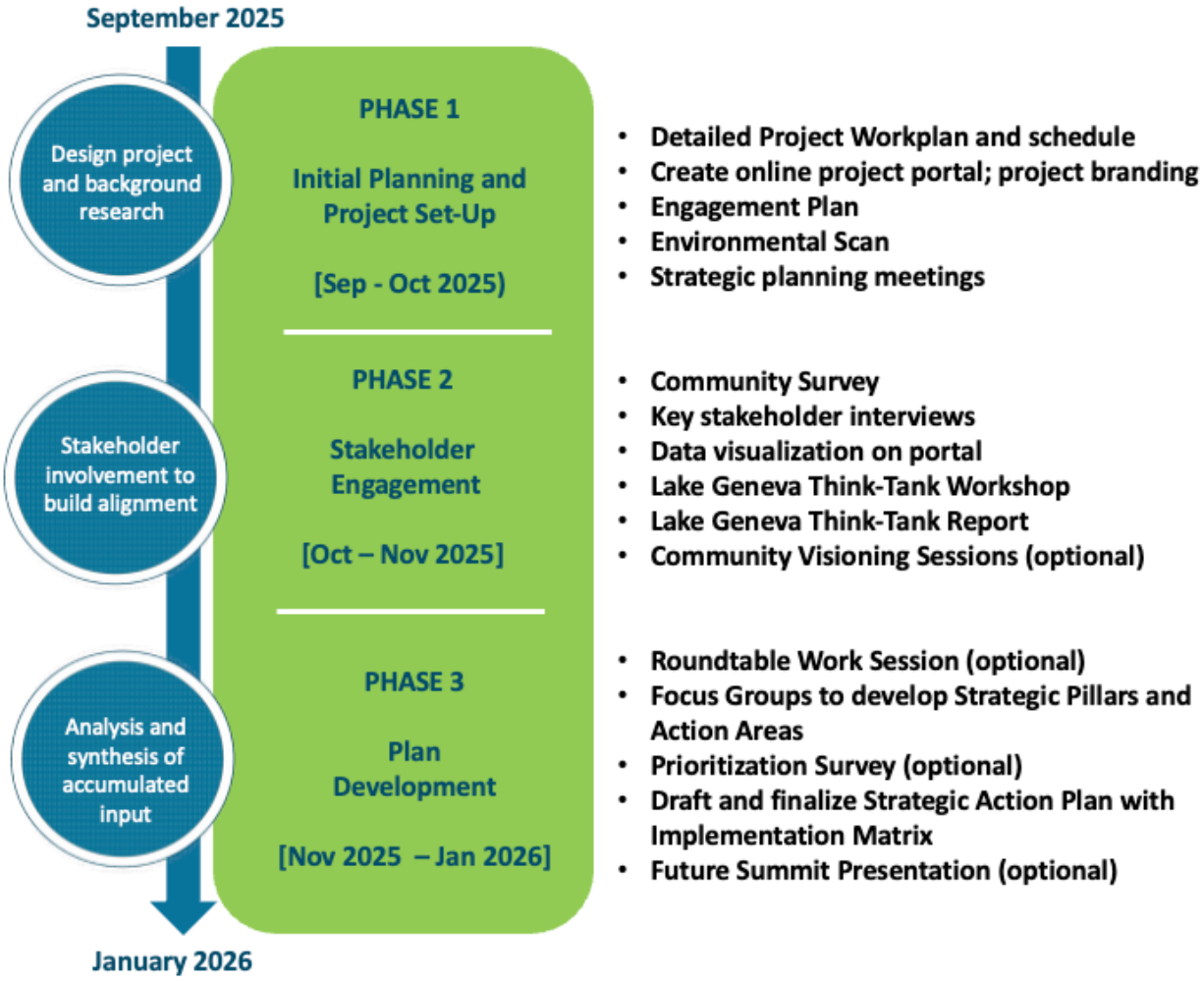
Address:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424

Phone:
612.757.9121
Email:
david@future-iq.com

3.0 Summary of the Proposal

The proposed project plan is implemented in three phases that build momentum around a new five-year Strategic Action Plan for the City of Lake Geneva. We understand that the City has undergone several transitions in the last two years and that this is the City's first ever strategic plan. The new Strategic Action Plan is intended to be inclusive and sustainable. It will unify stakeholders, build sustainability and resiliency, and align resources throughout the City. The scope of work will be included in the proposed project plan and incorporated into the three phases outlined below.

Proposed Project Plan



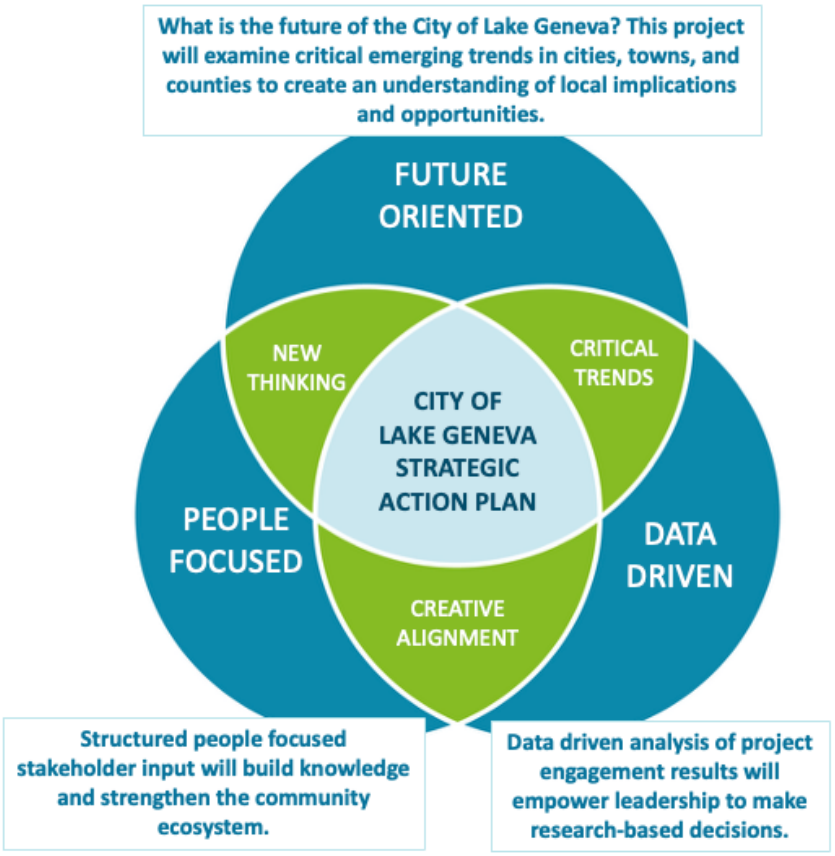
Note: As requested in the RFP, items indicated as optional may be added to the planning process to strengthen the outcome of the project. The addition of some of these items could potentially lengthen the strategic planning timeframe.

4.0 Recommended Planning Activities and Engagement

4.1 Methodological Approach – Overview

Future iQ brings a global perspective to strategic planning that is invaluable to local interests. For the City of Lake Geneva, this means access to a wealth of knowledge and experience in strategic planning for cities, counties, regions, organizations, and nonprofits. Future iQ will use this experience to guide and inform this project and will work with the Common Council, staff, stakeholders, and community members to develop comprehensive, future-oriented, sustainable, and implementable recommendations to support the new Lake Geneva Strategic Action Plan. The plan will balance priorities across the important dimensions specific to Lake Geneva and incorporate innovative global and local best practices. Future iQ's strategic planning methodology is based on three primary principles:

- **A 'future orientation' principle** is particularly important to take account of rapidly emerging environmental, technological, and societal trends.
- **The 'data driven' principle** ensures the plan is built on solid research and information. Presentation of the quantitative survey and Think-Tank findings are presented using data visualization platform where results can be filtered and viewed in a myriad of ways.
- **The 'people focused' principle** is important to build support for the recommendations, and to harness the best possible input into plan formulation.

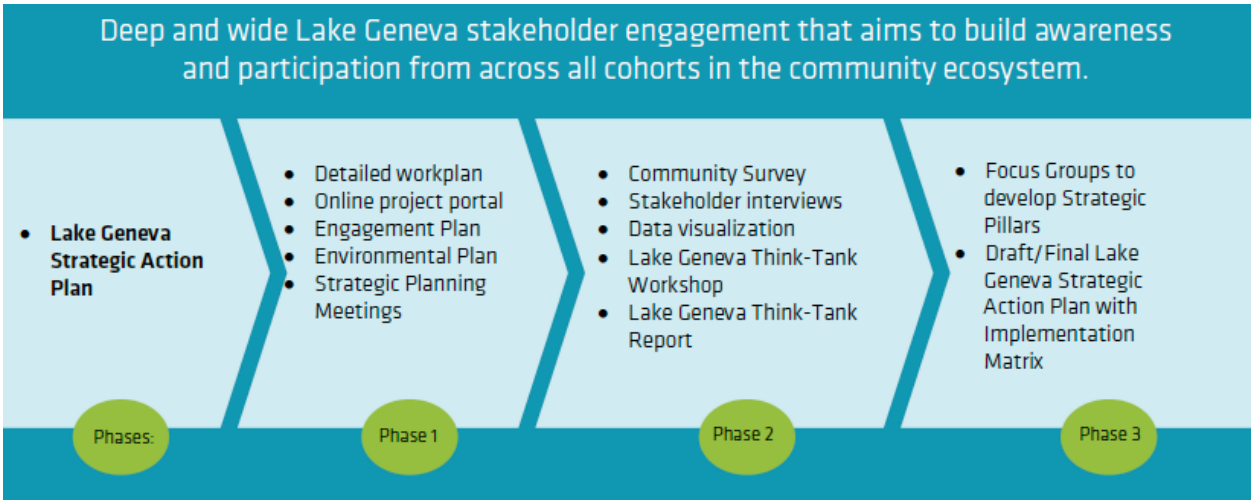


4.2 Engagement Plan

Engagement and transparent communication are cornerstones of Future iQ's strategic planning methodology. Our firm has facilitated strategic planning projects for over 20 years on a global scale, and has led the development of several innovative engagement tools and techniques such as scenario-planning, data visualization, customized foresight research, and The Future Game. We have used our methodologies across multiple settings and have built a reputation for a hands-on, people-focused, and highly customized approach to our projects.

The **Engagement Plan** for this project will be tailored and highly customized to fit the unique needs of the City of Lake Geneva. Future iQ will ensure the strategic planning process is open and accessible to stakeholders, and that multiple opportunities exist to provide input in a variety of formats. We will work closely with Lake Geneva staff to design a variety of engagement and outreach approaches to ensure participation by a broad and deep cross section of the City's community members and stakeholders, including those who don't usually participate in the civic process.

Below is a schematic of the engagement activities that will be included with this project. Additional methodologies may be added throughout the project as needed.



The following two sections outline and highlight the broad range of Future iQ's engagement methodologies and approaches.

PEOPLE-FOCUSED, HANDS-ON ENGAGEMENT METHODOLOGIES

Future iQ maintains a range of innovative proprietary project engagement methodologies. Not all methodologies are used with every project. We tailor the methodologies used to the unique needs of each of our clients.

Methodology	Description	Project Examples
Community and Stakeholder Surveys	Surveys typically gather quantitative and qualitative data that is used to drive our stakeholder data-visualization. Surveys are offered in Spanish and English, hard copy, and digital formats to reach as many cohorts as possible.	• VT Future Forests Stakeholder Survey • Falmouth, ME Community Survey • Littleton, CO Spanish and English Stakeholder Surveys
Listening Sessions & Interviews	These important initial public engagement interactions gather stakeholder input on concerns and aspirations for the future of communities or organizations. Virtual and in-person listening session allow exploration of local issues and concerns.	• University City Community Vision 2040 Listening Sessions • Middle Georgia Innovation Project – stakeholder interviews
Project Portal & Discussion Boards	Project Portals are the 'go to' place for stakeholders to find project information. Discussion Boards are a moderated on-line discussion methodology. These are effective for more complex discussions on topics to creatively explore ideas and issues.	• Future iQ Project Portals • Traverse City, MI Project Portal • Sugar Land, TX Project Portal • Smithville, MO Comprehensive Plan Discussion Boards
Future Game	The Future Game is a unique future planning simulation tool that rewards collaboration, innovation and teamwork. Playing the game allows stakeholders to apply the learning from the game to their own decision making and planning.	• National Congress of American Indians Future Game
Data Visualization	Future iQ's data visualization of survey data on the project portal provides a fun and interactive way to give transparent feedback to stakeholders while at the same time exploring issues of importance.	• Greater Mankato 2040 Data Visualization • Traverse City, MI Data Visualization • Keene, NH Data Visualization
Think-Tank	Think-Tanks are a scenario-based strategic planning methodology. This is very powerful way to create plausible futures and explore concepts of Preferred and Expected Futures. Typically, 50-150 people take a deep dive into future exploration.	• Sugar Land, TX Think-Tank • Romulus, MI Think-Tank • University City, MO Think-Tank • Greenwood, MO Think-Tank • PlanKCK, KS Vision Summit
Vision/Strategy Workshops	Community or Stakeholder Vision and Strategy Workshops take place after the scenario-development at the Think-Tank. The aim of these workshops is to build a deeper understanding of the preferred future and to gather wide input on preliminary strategies.	• Coppell Vision 2040 Community Visioning Workshops • Smithville, MO Community Visioning Workshops
Focus Groups	Future iQ developed a Focus Group methodology that is used to build out the detail of the strategic pillars that are the foundation of a community vision. These are smaller, topic-dedicated expert groups.	• Falmouth Vision and Values Focus Groups • The Future of Wellbeing Focus Group summaries
Future Summits	Future Summits are large scale stakeholder events, that are often capstone events to present project results. Future iQ also utilizes rapid polling and final survey work to gather stakeholder input at these events.	• Greenwood, MO Future Summit • Traverse City, MI Future Summit • Keene, NH Future Summit

PEOPLE-FOCUSED ENGAGEMENT APPROACHES TO STAKEHOLDER COHORTS

Future iQ's people-focused engagement is welcoming and inclusive of all stakeholder cohorts. We strive to include those who don't usually participate in the public process.

Cohort	Approach	Project Examples
Youth	Future iQ strongly supports incorporating the youth voice into visioning and planning processes. We work with high school and university cohorts, recreation groups, and plenary sessions with 500+ students.	• Smithville, MO Youth sessions • Mitchell, SD Youth Sessions & Survey
Seniors	Populations are aging in many communities and as a result, Seniors are an important demographic impacting infrastructural and programmatic community needs. Future iQ seeks out Senior input at living places, Senior Centers, faith centers, Homeowner Associations, etc.	• Park City, UT Senior Center • Wayzata, MN Engagement • Hilton Head Island, SC Engagement
Minority Groups	Significant barriers exist that prevent underrepresented groups from participating in civic processes. Future iQ breaks down these barriers by translating materials and going to gathering places such as faith places, workplaces, multi-cultural and community centers, and community eating places.	• Moab, UT Spanish Speaking Community • Park City, UT Latinos in Action • Coppell, TX Community Fabric • UG Wyandotte County-KCK Vision Summit
Business and Industry	Planning for economic development requires the input from business and industries. Future iQ gathers this important input by facilitating online and in-person focus groups at individual businesses, chambers of commerce, rotary, industry and trade associations events.	• VT Forests Industry Roundtables • Middle Georgia Charrette Process • IMEC Stakeholder Group Sessions • IDNR Industry Focus Group Survey • NERDIC Industry 4.0 Readiness
Working Parents	Future iQ recognizes that working parents are a cohort that is stretched thin with responsibilities. We hold project activities in suitable timeslots, and particularly in the evenings to accommodate this cohort. We also reach out through PTOs, school newsletters, and events.	• University City, MO Evening Sessions • Waseca, MN Engagement Sessions
Young Professionals	We understand that young professionals have very little time for extra activities in their lives. Future iQ goes directly to this cohort through young professional organizations, networking, and training events.	• Middle Georgia Engagement • Moab, UT Young Professionals • Wayzata, MN Engagement
Officials and Community Leaders	Elected officials and community leaders are critical advisors to any project. Future iQ provides information to this cohort through Council briefings and gathers input at City-sponsored and project events, professional conferences, and speaking opportunities.	• Trotwood, OH Fostering Leadership • NADO Training Conference • VT Future Forests Industry Roundtables
General Public	Future iQ provides transparency and multiple avenues for input from the public. We do this through means such as emails, social media, newsletters, open forums, Town Hall meetings, workshops at community centers and libraries.	• University City, MO Community Centers • Mitchell, SD Community Sessions • Falmouth, ME Online Summits

4.3 Scenario-Based Think-Tank Methodology

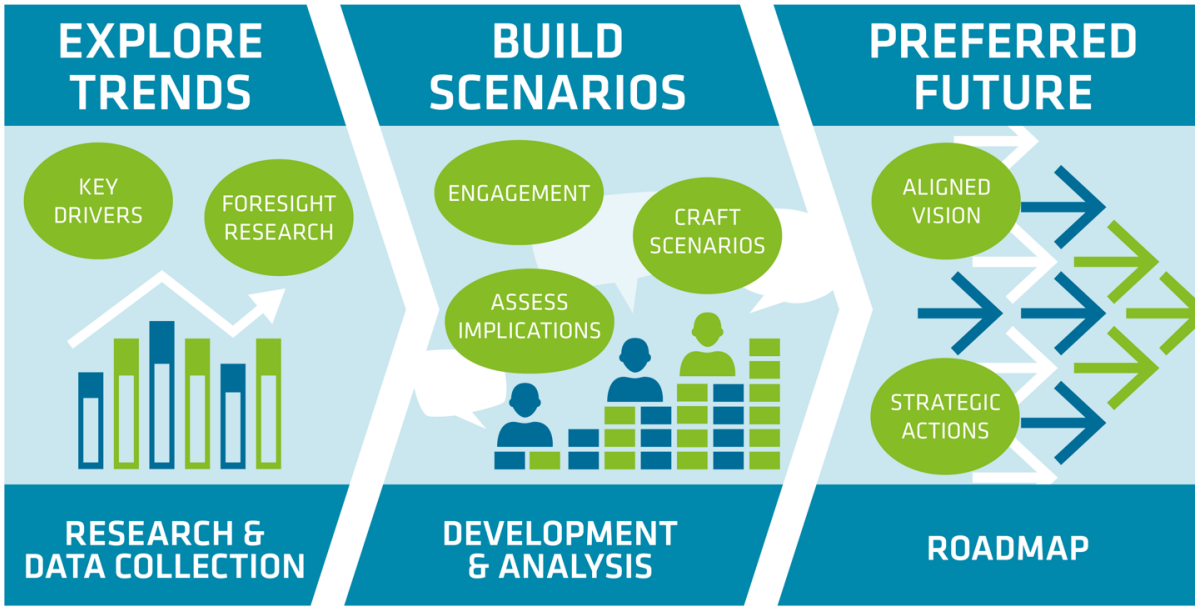
Future iQ uses a scenario planning approach to strategic planning, with a dedicated two-session Think-Tank workshop. The Think-Tank creates scenarios that are not predictions but will, through the Think-Tank process, produce four plausible futures for the City of Lake Geneva. Key aspects and features of the approach include:

- The Think-Tank results will be instrumental to the end of the project. The process is inclusive, easily scalable, and can draw input from all cohorts of the City's community ecosystems.
- It is front loaded with a presentation of key future trends that relate to Lake Geneva and the results from the Community Survey.
- Participants discuss the key drivers that are important to the City's strategic planning process. These key drivers are then ranked with the Think-Tank participants relating to importance and urgency.
- The Scenario Matrix is developed by Future iQ from the first part of the Think-Tank.
- Four plausible scenarios are developed in the later stages of the Think-Tank. This allows stakeholders to visualize different possible futures for Lake Geneva.
- Scenario names and descriptions are described by the Think-Tank participants.
- The expected, preferred, and least desired futures are produced and uploaded to the Lake Geneva project portal.
- The scenario-planning process illustrates the interconnectedness of planning processes and encourages more holistic planning.
- The journey from the expected future to the preferred future is then pursued by building out the steps to get there.

There are several important design principles to the proposed strategic planning approach, including:

- **Strong collaborative and inclusive people-focused approach**. The long-term success of this project will be dependent on building strong collaboration among the City's various stakeholders. The development of this type of 'eco-system' needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for Lake Geneva.
- **Future oriented**. Building a City-wide shared vision will be critical for Lake Geneva. To develop an agreed upon vision and plan, stakeholders will need clarity and a common understanding of the drivers impacting the City's operations.
- **Data driven approach, including data visualization**. Our experience suggests that projects like this are most successful when built on transparent data driven approaches, inclusive of as many stakeholder voices as possible.
- **Project management and communication strategy.** Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.

Below is the visual outline of how Future iQ's scenario-based strategic planning process works.



For Lake Geneva, the Think-Tank process can further examine circumstances including:

- What makes Lake Geneva unique and how can the City use these characteristics to prepare for the future?
- How will stakeholder preferences fit into this vision and how will their evolving demographics be incorporated into the new vision?
- How should funds be invested and leveraged to build resiliency for the City?
- How does Lake Geneva fit into the larger statewide ecosystem?
- What are the specific strategic gap and growth areas for Lake Geneva and does previous planning address those areas?
- How may financial/budgetary issues on the state level impact Lake Geneva and how can the City prepare for potential budget challenges?
- What unique hurdles might the City face, and how do we build collaborative approaches and structures to ensure continued successful programs and services for its community members and stakeholders?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story stakeholders want to tell, and what future do they want for Lake Geneva?

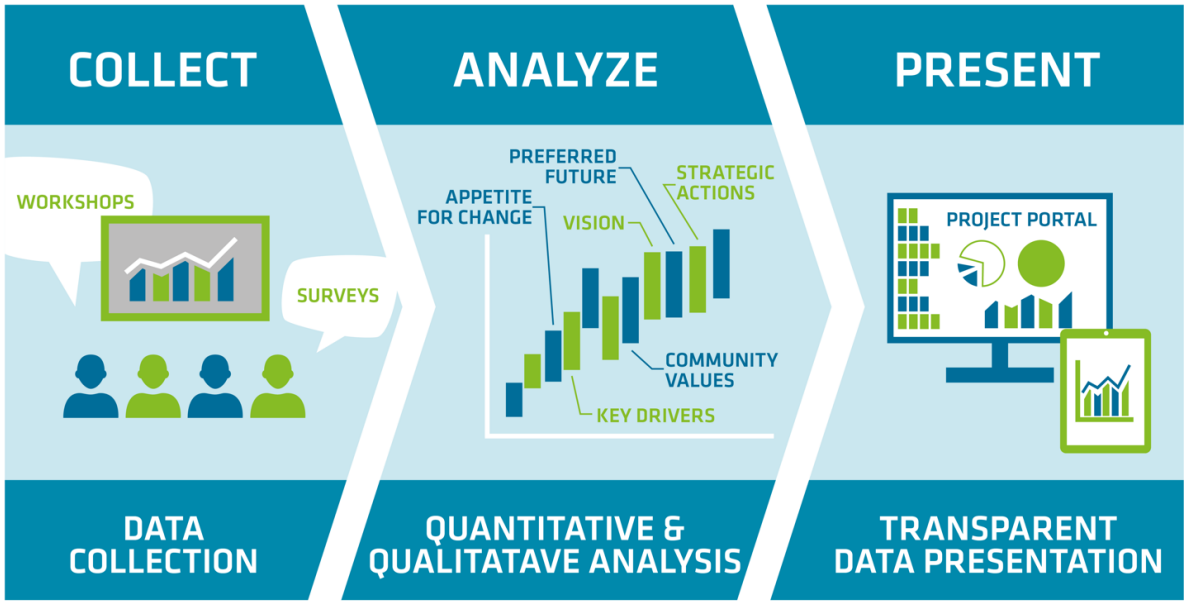
The methodology being proposed by Future iQ in this proposal is more in-depth than a SWOT analysis and will allow community members and stakeholders to tackle these questions in an engaging and thought-provoking manner. Following the Think-Tank, Future iQ will produce an in-depth **Lake Geneva Think-Tank Report**. This will then lead to the clarification of the emerging vision and focus areas that will serve as a foundation for the Lake Geneva Strategic Action Plan.

4.4 Data Visualization

Data collection and development from surveys provides an inclusive process and a comprehensive understanding of community and stakeholder views and where points of consensus lie. Future iQ will use an online Lab Portal to collect and display community survey results. For examples, please see http://lab.future-iq.com. This approach provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across community ecosystems.

Data visualization allows individual stakeholders to see where they fit into community perspectives.

The strategic planning process for Lake Geneva includes surveys that will reach as many community members and stakeholders as possible. Future iQ's data visualization allows viewers to sort and filter the data by cohort group, revealing sentiments by cohort filters such as City affiliation, neighborhood, age, etc. The Lab also serves as a central location where stakeholders can go to find updated project information and notices.

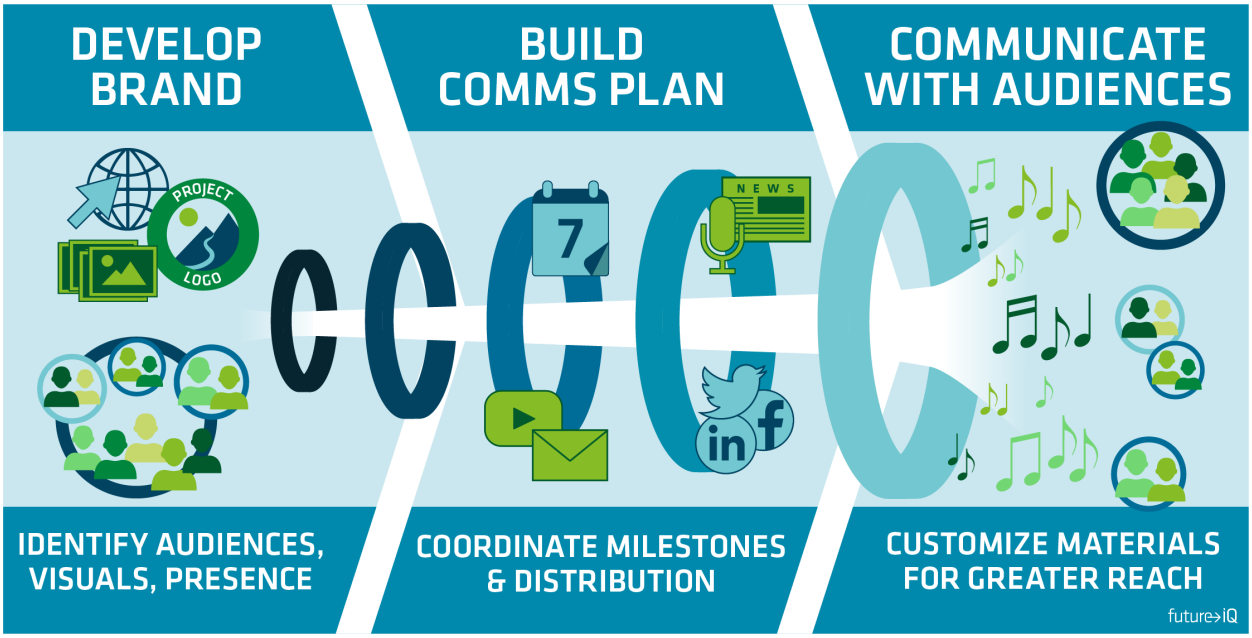


Future iQ prioritizes ensuring our content, analysis, and findings are easy to understand and approachable for all audience types. This helps make sure that our engagement reaches a wide variety of community members and conversations can dive deep regardless of participants' familiarity on the topic. The strategic planning process is an important time for Lake Geneva. By leveraging data visualization and easy-to-follow content, we draw higher participation rates and more meaningful conversations.

4.5 Project Portal and Communications

Communications are integral parts of Future iQ's methodologies. We take care to provide project information to stakeholders that is approachable, accurate, and sensitive to local concerns. Our communications involve both digital and traditional methods to include as broad an audience as possible. We work closely with our clients to maintain regular communications for the duration of the project. It is our experience that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.

A key part of our communications is the distribution of information via the associated customized project portal. The **project portal** serves as a central location where community members and stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. The portal provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across a community ecosystem. Visit lab2.future-iq.com for examples. Note the project portal has a translation feature that may be turned on by users to translate the portal into many languages including Spanish.



5.0 Work Plan & Timeline

5.1 Proposed Project Timeline

The following chart outlines key tasks and suggested periods of activities for this project's Work Plan. This timeline reflects the relative emphasis of activity. Work on several of the key deliverables will occur in parallel to allow the phases to be completed within the project timeline. We will work with Lake Geneva staff to create a timeline that incorporates the specific needs of the City and remains flexible over the course of the project.

Key Phases	Key Deliverables	S	O	N	D	J
Phase 1: Initial Planning and Project Set-Up	Detailed Project Work Plan and schedule					
	Create online project portal; project branding					
	Engagement Plan					
	Environmental Scan					
	Strategic planning meetings					
Phase 2: Stakeholder Engagement	Community Survey					
	Key stakeholder interviews					
	Data visualization on portal					
	Lake Geneva Think-Tank Workshop					
	Lake Geneva Think-Tank Report					
Phase 3: Plan Development	Focus Groups to develop Strategic Pillars and Action Areas					
	Draft and finalize Lake Geneva Strategic Action Plan with Implementation Matrix					
Ongoing	Weekly meetings with client liaison					
	Project portal updates					
	Engagement and Communication Plans ongoing delivery					

Note: As stated in the RFP, we understand that the Common Council would like the project to be completed and presented on December 22 (2025) or January 12 (2026). We would select the January option to allow more time for engagement and plan development.

As requested in the RFP, additional optional stakeholder engagement activities are itemized in our cost proposal and include:

- Community Visioning Sessions
- Roundtable Work Session with City Council and Staff
- Prioritization Survey
- Future Summit Presentation

5.2 Work Plan Details

The initial planning and project set-up invites participation, creates anticipation, and sets the tone for the planning process.

Future iQ works hard to deliver our projects on-time and on-budget. Below is a detailed description of the three phases of our proposed Work Plan for this project.

5.2.1 Phase 1: Initial Planning and Project Set-Up

This project will begin with meetings with City staff to establish a final **Work Plan and schedule** that provides a detailed explanation of the overall project design and more clearly defines roles, tasks, timelines, and responsibilities throughout the life of the project. Additionally, the project's **Engagement Plan** will be a detailed plan outlining the specific engagement activities to occur throughout the project. The Engagement Plan for this project will be flexible and tailored to fit the broad needs of the City's community members and stakeholders.

To familiarize ourselves with the City environment, the project team will conduct background research consisting of a **review of existing documents** and materials exploring impacting trends and the current City environment and plans. This will be undertaken to understand those strategic directions already established and to identify progress made towards those objectives. This situational analysis will help team members to build a firm understanding of local accomplishments, challenges, goals, and priorities. This information will be compiled into an **Environmental Scan Report** for reference throughout the strategic planning process.

During Phase 1, Future iQ will create a unique project portal. The **project portal** serves as a central location where stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. Communications will involve both digital and traditional methods to reach as broad an audience as possible. This project team will schedule **weekly strategic planning calls** with our City staff contact throughout the duration of the project. It is our firm belief that regular communications keep communication lines open and add to the transparency of the planning process.

Deliverables from Phase 1 will include:

- Detailed Project Work Plan and schedule
- Create online project portal; project branding
- Engagement Plan
- Environmental Scan
- Strategic planning meetings

RFP requirements addressed by deliverables in Phase 1:

- Design of an inclusive planning process that involves input from Council members, City Staff, residents, businesses, and input from historical planning efforts such as the Comprehensive Plan.
- Environmental Scan

5.2.2 Phase 2: Stakeholder Engagement

Scenario development will allow stakeholders to explore future planning options and to visualize possible futures for Lake Geneva.

The project team will begin Phase 2 with the launch of a **Community Survey** that will analyze stakeholder sentiment and appetite for change and future readiness. The results of the Community Survey will be posted on the project portal using a **data visualization platform**.

Future iQ will also conduct **key stakeholder interviews** with key stakeholders to gather personal insights and thoughts on the current conditions and the future for Lake Geneva. This is intended to provide background information for the project team, and to promote the strategic planning process. This will familiarize stakeholders with the project team and ensure 'buy in' on the strategic planning process from the start.

Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping both rural and urban areas. This future-oriented lens guides Phase 2 as it creates the building blocks of the preferred vision for Lake Geneva using a scenario-based planning methodology. Using trend research and expectations about cities and counties, this methodology will enable stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a two-session in-person **Lake Geneva Think-Tank Workshop.**

The methodology being proposed is more in-depth than a SWOT analysis and will lead to the clarification of a preferred vision and preliminary strategic action areas for the City that will serve as the foundation for the Lake Geneva Strategic Action Plan. The results from the survey and Think-Tank will be compiled in the **Lake Geneva Think-Tank Report** and posted on the project portal.

Deliverables from Phase 2 will include:

- Community Survey
- Key stakeholder interviews
- Data visualization on project portal
- Lake Geneva Future Think-Tank Workshop
- Lake Geneva Future Think-Tank Report

RFP requirements addressed by deliverables in Phase 2:

- Development of Mission, Vision, and Values Statements.
- SWOT Analysis (Think-Tank).
- Development of initial framework for goals, objectives and strategies for the plan.

5.2.3 Phase 3: Plan Development

The Strategic Action Plan will articulate clear guidance on the steps needed to achieve the preferred future for Lake Geneva.

After the Think-Tank, the project team will then conduct **Focus Groups** with specified stakeholder groups to build out the Strategic Pillars of the Strategic Action Plan. These Focus Groups will explore the goals and actions needed to get to the preferred future for Lake Geneva. The project team will develop action areas for each of the Strategic Pillars in the new Strategic Action Plan.

After the development of the Strategic Pillars and Action Areas at the Focus Groups, Future iQ team members will work closely with Lake Geneva staff to craft a detailed framework for the Strategic Action Plan including a timeline with responsible parties and an **Implementation Matrix** for ongoing monitoring and reporting. This will in involve careful synthesis of all research, engagement results, surveys, reports and analyses. The project team will produce a **draft of the Lake Geneva Strategic Action Plan** and seek input from the Common Council and City Staff. The final draft will provide feedback mechanisms and a systematic approach to future review and adjustments to the plan.

Measuring Effectiveness

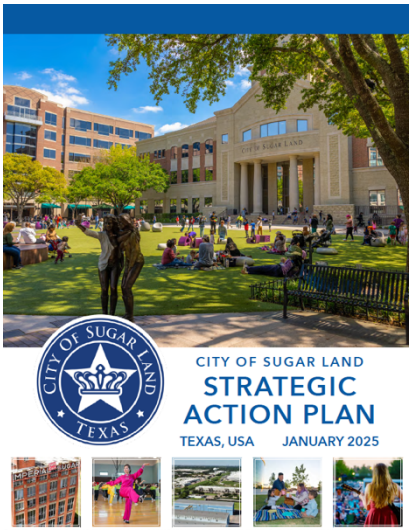
Understanding and measuring progress in key performance areas will be an important part of implementing the Lake Geneva Strategic Action Plan. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. Phase 3 of this project plan includes the development of measurements to support periodic review and adjustment of strategic action plan over time.

Deliverables for Phase 3 include:

- Focus Groups with specified stakeholder groups to develop Strategic Pillars and Action Areas
- Draft and finalize Strategic Action Plan with Implementation Matrix

RFP requirements addressed by deliverables in Phase 3:

- Final development of goals, objectives and strategies for the Strategic Action Plan.
- Development of timeline, responsible parties and costs in an Implementation Matrix that will identify key performance indicators and allow for monitoring of success and consideration for the next strategic planning process.
- Final Strategic Action Plan document.



6.0 Staffing Plan

The client-facing Future iQ team members presented in this proposal have significant experience working on visioning, strategic planning, and economic development projects in both rural and urban settings. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and/or virtually, and for data analysis and report preparation.

The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning, strategic planning, economic development, and foresight research
- Knowledge and experience with cities, counties, state agencies, municipalities, corporations, regional entities, and non-profit organizations
- Project management, stakeholder engagement, and workshop facilitation
- Communications, graphic design, data visualization, and project branding

Project Director David Beurle will be the primary contact person for this project. Below are the respective team member roles for this project.

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, Facilitation, Strategy Development
Adam Bentley	Research Strategist	Research and strategy development
Celine Beurle	COO, Future iQ	Project Coordinator
Heather Branigin	VP, Foresight Research	Foresight Research
Brittany Rempe	Creative Director	Graphic design and branding
Tobiloba Adaramati	Data Analyst	Data Analysis
Walter Paixao-Cortes	Data Engineer	Data Visualization

For complete project team resumes, please see **Appendix A.**

7.0 References

Below are four recent references for Future iQ's work on strategic planning. Additional references are available upon request.

City of Traverse City, Michigan (2024-2025) Strategic Action Plan	Elizabeth Vogel City Manager City of Traverse City 400 Boardman Avenue Traverse City, MI 49684 Tel: 231-922-4700 Email: evogel@traversecitymi.gov
City of Romulus, Michigan (2022-2023) Vision Romulus – Our Community, Our Future	Julie A. Wojtylko, CPM Chief of Staff City of Romulus Office of the Mayor Tel: 734-955-4501 Email: jwojtylko@romulusgov.com
City of Smithville, Missouri (2019) Vision and Strategic Action Plan; Smithville Comprehensive Plan (2019-2020) Smithville Parks & Recreation Master Plan (2021) Smithville Transportation Master Plan (2021-2022)	Cynthia Wagner City Administrator City of Smithville Smithville, MO 64089 Tel: 816-532-3897 Email: cwagner@smithvillemo.org
Sugar Land, Texas (2024-2925) Strategic Action Plan	Brittaney P. Sinclair, Assistant Director Strategic and Government Affairs City of Sugar Land 2700 Town Center Blvd N Sugar Land, TX 77479 Tel: 281-302-8885 Email: bsinclair@sugarlandtx.gov

8.0 Examples of Strategic Planning Documents

This project will explore complex issues to develop a forward-thinking strategic plan that unifies, strengthens, and advocates for the City of Lake Geneva in new ways. Examples of our project reports and various foresight research reports can be found on the Future iQ website and on Future iQ's stakeholder Research Laboratory. Please click on the links below to access reports and materials for each strategic planning project.

8.1 Highlight Strategic Planning Projects

- **City of Traverse City, MI** Strategic Action Plan
  This recent project created a strategic plan for Traverse City looking out to 2030. The objective of the strategic planning process is to build on Traverse City's current success and incorporate new actions to maintain this success over the next 5 years. The process involved key stakeholder interviews, two surveys, a Think-Tank, Focus Groups, a Roundtable Session, and a Community Dashboard/Balanced Scorecard.
- **City of Essex Junction, VT** Vision and Strategic Action Plan
  Future iQ recently completed this visioning and strategic planning project. The visioning included transparent, deep and robust community engagement as a focus of the strategic planning process. The Strategic Action Plan defines priorities and will guide decision making over the next five years.
- **City of Romulus, MI** Community Vision and Action Plan
  Romulus is a diverse community situated around the Detroit Metropolitan Airport. Recently completed, this community-wide effort brought the community together through extensive engagement methods to identify a realistic vision for the future of the City. The intention of the process was to create a unified Community Vision plan that would inform decision-making on planning, land use, and policy making for the City.
- **Lorain County, OH** Loraine County Strategic Action Plan
  The Lorain County Board of Commissioners recently embarked on a comprehensive and sustainable 5-year Strategic Action Plan for the County. The objective of this strategic planning project was to build on Lorain County's current success and incorporate new actions to maintain and enhance this success over the next 5 years.
- **City of Sugar Land, TX** Strategic Action Plan
  To continue its current success, the City of Sugar Land aspires to be even more ambitious, innovative, and forward-thinking with a commitment to improvement and a continuation of being a 'Trailblazing' city. The outcome of this process, running July 2024 through January 2025, produced a robust, comprehensive and sustainable Strategic Action Plan.
- **City of Coppell, TX** Community Vision and Strategic Action Plan
  Coppell is a community that has a growing Asian population, currently almost a third of the population. Future iQ worked closely with stakeholders to create a vision and action plan that was welcoming and inclusive of all new community members.
- **City of Pflugerville, TX** Strategic Action Plan
  The strategic planning process for this recent project aimed to build on Pflugerville's current success and incorporate new actions to maintain this success over the next 5 years.

- **City of Smithville, MO** Comprehensive Plan
  Facilitated by Future iQ and JS&A, this original comprehensive planning project was built on the community's visioning and strategic planning process that Future iQ also facilitated. The plan involved the strategic economic development of unique character areas and StoryMaps of each identified area of the City. The strategic pillars that emerged from the original strategic planning process were instrumental building blocks of the Comprehensive Plan. Two areas for further study that emerged from the comprehensive planning process were the need for a Parks and Recreation Master Plan, as well as a Transportation Master Plan.
- **University City, MO** Community Vision and Strategic Roadmap
  Future iQ completed the community visioning and planning for University City, a diverse community with significant economic disparities. Led by a Task Force comprised solely of community members, the roadmap that emerged from this process celebrated the rich diversity of the community and incorporated this strength into its vision for the future.
- **City of Edina, MN** Vision Edina and Nodes and Modes Bridging to Comprehensive Plan
  After facilitating the Edina's strategic visioning process, Future iQ led a bridging planning process that coupled together neighborhood development with multimodal transport connections. The concept guided the city's comprehensive planning process as the community sought to enhance the city's characteristics and community fabric, while at the same time embracing urban renewal and targeted redevelopment.
- **City of Moab, UT** Moab – Tomorrow Together
  Future iQ recently completed the community visioning and strategic planning for the City of Moab. The results of this process set the framework for future land use, economic, social and environmental decisions. A key goal of this process was to help the community articulate tangible and intangible elements that, if lost, would fundamentally change the character of Moab.
- **Park City, UT** Community Vision and Action Plan
  The visioning and strategic action planning for this project engaged approximately 1,700 people in a series of surveys, engagement sessions, focus groups and two key Future Summits. The process was designed to provide an open, inclusive and transparent platform for community members to help create a shared vision and board action plan for Park City.
- **Town of Falmouth, ME** Vision and Values The community of Falmouth developed a Town Vision and Values statement through a robust visioning process prior to embarking on the update of its latest Comprehensive Plan. The engagement process was designed to provide and open, inclusive, and transparent platform for community members to help create a shared community vision and values for the future.
- **City of Mitchell, SD** Community Vision and Strategic Action Plan
  The Forward 2040 project brought the community together with a large-scale visioning and strategic planning process to meet the future challenges facing the community. The work was built on open and transparent public participation and thoughtful and constructive dialogue. The final plan includes a strategic roadmap for community decision-making looking out to 2040.

8.2 Additional Strategic Planning Projects

The majority of Future iQ's experience is working with public agencies and municipalities in the United States. Our national reach enables us to provide clients with insights from cities, counties and organizations in both urban and rural areas. We specialize in visioning and strategic planning and provide highly customized plans that are tailored to each of our clients. Below are additional examples of Future iQ's visioning and strategic planning projects. Work products and project summaries are available in the embedded links below.

- U.S. Department of Defense, Madison F35 Community Connection Project
- New North Inc., WI Business Intelligence Strategic Planning
- Oshkosh Initiative, WI Regional Collaborative Action Plan
- East Central WI Regional Planning Commission, WI Fox Valley Regional Planning
- McHenry County College, IL Strategic Foresight Project
- City of Trotwood, OH Organizational Strategic Plan
- City of Wayzata, MN Wayzata 2040 Community Vision
- B.E.S.T. of Waseca County, MN Community Vision and Strategic Action Plan
- Town of Hilton Head Island, SC Vision and Strategic Action Plan
- City of Keene, NH Vision Keene 20-Forward Comprehensive Master Plan (CMP)
- City of Greenwood, MO Vision Greenwood Comprehensive Master Plan
- Abbeville County, SC Strategic Plan
- Lower Savanah Council of Governments, GA Strategic Action Plan
- Flint Hills Regional Council, KS Sustainability Plan and Roadmap
- Greater Mankato 2040, MN Regional strategic visioning project
- City of Littleton, CO Comprehensive Economic Development Strategic Plan
- UG of Wyandotte County-Kansas City, KS Economic Development Strategy
- State of Vermont, VT Vermont Forest Future Strategic Roadmap
- Iowa Department of Natural Resources, IA Strategic Vision for Iowa
- Denton, TX Comprehensive Solid Waste Management Strategy
- McKinney, TX Solid Waste Management Strategy
- Middle Georgia Creating an Innovation Corridor
- Greater Bemidji, MN Strategic Action Plan Update
- Smithville School District, MO Organizational Strategic Plan
- Greater Lima Region, OH Collaborative Action Plan
- Tillamook County, OR Tourism Investment Strategic Vision Action Plan
- Moosehead Lake Region, ME, Regional Vision and Strategic Action Plan
- Snohomish County, WA Regional Destination Visioning and Planning
- Scott County, MN Visioning and Planning
- Kewaunee County, WI Regional Planning
- National Association of Development Organizations (NADO), DC Strategic Action Plan
- Council of State Community Development Agencies (COSCDA), DC Strategic Action Plan
- New Hampshire Aerospace and Defense Consortium (NHADEC), DC Strategic Action Plan

9.0 Complete Team Resumes

9.1 Project Director, David Beurle, CEO, Future iQ

RÉSUMÉ

david@future-iq.com

David Beurle is a world-renowned strategist, futurist, researcher and practitioner. As founder and CEO of Future iQ, David is a pioneer and expert in creating new and innovative future planning approaches for use in community, regional, industry, organizational and government settings. David has pioneered the application of scenario planning within regions, industry and corporations around the world. David created the Future Game™, a global planning and workshop tool that has been used in over 600 workshops across 10 countries. As CEO of Future iQ, David has led global projects across 4 continents and has written a number of foresight papers: future-iq.com/foresight-research.

Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has the major role in all of Future iQ's projects as lead project manager. More details on David's work can be seen at davidbeurle.com.

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder & CEO Future iQ, USA & Europe, 2003 – Present

Principal Adviser, Minister for Primary Industries, Western Australia, 1991 – 2000

Rangeland Scientist, Western Australian Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

Founding member, Plant-Based Product Council, USA, 2019

future→iQ

Create **Future Intelligence**™

www.future-iq.com

DAVID BEURLE B.SC. AGR

CHIEF EXECUTIVE OFFICER

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023 – 2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- COSCDA Strategic Action Plan, Washington DC, 2023 – 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Littleton Comprehensive Economic Development Strategy, Colorado, 2023
- Unified Government Economic Development Strategic Plan, Kansas, 2023
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together – Greater Mankato 2040, Minnesota, 2022-2023
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Smithville Schools District Strategic Plan, Missouri, 2023
- Florida Network Mapping, Florida, 2022
- Vision Romulus, Our Community, Our Future, Michigan, 2022
- Transforming Together Tomorrow - Greater Mankato, Minnesota, 2022
- Moab - Tomorrow Together, Utah, 2022
- The Future of Well Being Foresight Project, Minnesota, 2021-2022
- Envision East Central Iowa, Iowa, 2021-2022
- University City Community Vision, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy, New England, 2021-2022
- City of Smithville Transportation Plan, Missouri, 2021-2022
- Town of Falmouth Vision & Values, Maine, 2020-2021
- The Middle Georgia Innovation Project, Georgia, 2020-2021
- City of Smithville Comprehensive Plan, Missouri, 2020
- Park City Community Vision & Strategic Action Plan, UT, 2019-2020
- NOHOA Community Survey 2019-2020
- ECC Medical/Well-Being Strategic Marketing Plan & Economic Development Plan, Minnesota, 2016-2019
- Tillamook County Strategic Vision & Action Plan, Oregan, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Future of Urban Living Think Tank, St Georges House, Windsor Castle,UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017-2018
- City of Coppell, TX, Community Visioning, 2018-2019
- Maine Woods, Tourism Impact Study, 2017-2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016-2018
- North Coast, Oregon, Tourism Destination Management, 2018-2019
- New Hampshire Aerospace & Defense Consortium, Strategic Action Plan, 2017-2018
- Hilton Head Island, South Carolina, Community Visioning Project, 2016-2017
- University of MN, Future of Midwest Agriculture, 2016-2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015-2017

RECENT PUBLICATIONS

- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- The Future of Manufacturing in Illinois, 2022
- Envision East Central Iowa Final Report, 2022
- University City Community Vision Final Report, 2022
- Town of Falmouth Vision & Values Final Report, 2022
- The Middle Georgia Innovation Corridor Report, 2021
- City of Smithville Parks & Recreation Master Plan, 2021
- The Holding Space: A Guide for Partners in Tribal Research, 2020
- The Future of Urban Living, 2019
- The Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017-2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015

RECENT KEYNOTE PRESENTATIONS

- County Commissioners Association of Ohio Summer Symposium, August 2024
- SMART Manufacturing Conference, Pennsylvania, October 2022
- ITB Berlin Travel Trade Show, Berlin, March 2022
- The Mahoosuc Way Summit, Maine, February 2022
- Aggregate Producers of Wisconsin Annual Convention, Wisconsin, December 2021
- Ohio Food Summit, Ohio, USA, March 2020
- Greater Mankato Annual Summit, Minnesota, USA, March 2020
- New North Regional Summit, Wisconsin, USA, December 2019
- New Hampshire PTAC Conference, NH, USA, December 2019
- Institute of Directors (IoD) Annual Conference, Gleneagles, Scotland, October 2019
- E.P.I.R.C Manufacturing Conference, PA, USA, October 2019
- City of Smithville Youth, Missouri, USA, September 2019
- AgFutures 2035 Conference, Perth, Australia, August 2019
- Agricultural Symposium keynote, Emmetsburg, Iowa, USA, March 2019
- Wisconsin Integrated Resource Management Conference, Stevens Point, Wisconsin, USA, February 2019
- The Future of Urban Living Consultation, St George's House, Windsor Castle, UK, December 2018

9.2 Adam Bentley, Research Strategist, Future iQ

RÉSUMÉ

adam@future-iq.com

EDUCATION

Bachelor of Arts in Political Science, University of Northern Iowa

Master of Public Policy, University of Northern Iowa

Master of Business Administration, Texas A&M-Commerce

EMPLOYMENT

Senior Planner/Economic Development Specialist - East Central Iowa Council of Governments, 2019-2022

Assistant Village Administrator - Waunakee, WI, 2016-2019

Adjunct Faculty - Buena Vista University, 2016-Present

Assistant City Manager - Manhattan, Kansas, 2013-2014

Administrative Assistant to the City Manager - Iowa City, IA, 2011-2013,

Management Fellow, Wichita, KS, 2010-2011

AWARDS / CERTIFICATIONS

Young Professional of the Year 2019-Waunakee Chamber of Commerce

International City/County Management Association (ICMA) Essential Management Skills Certificate

Heartland Economic Development Course (HEDC) Certified

future→iQ

Create **Future Intelligence**™

www.future-iq.com

ADAM BENTLEY B.A., M.P.P., M.B.A.

RESEARCH STRATEGIST

Adam Bentley works for Future iQ as Research Strategist. Adam's background includes experiences working with local and regional governments across the American Midwest. He has a broad background which includes government administration, economic development, strategic planning, human resources, and grant writing. Adam holds a master's degree in public policy from the University of Northern Iowa and a master's degree in business administration from Texas A&M-Commerce. He also serves as an adjunct faculty member for Buena Vista University teaching courses in government, management, and liberal arts.

Adam has a passion for public service and continues to volunteer in local city and non-profit organizations to help improve his community.

RECENT PROJECT EXPERIENCE

- Traverse City Strategic Action Plan, Michigan, 2024 - 2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- Cornell College Strategic Roadmap Development, Iowa, 2023

RELEVANT PUBLICATIONS

- Madison F35 Community Connections Situational Analysis, 2024
- Lorain County Strategic Action Plan Benchmark Report, 2024
- City of Essex Junction Benchmark Report, 2024
- City of Cornell Strategic Roadmap Development Think-Tank Report, 2023

9.3 Celine Beurle, COO, Future iQ

RÉSUMÉ

celine@future-iq.com

EDUCATION

Masters Degree in Sociology

University College Cork, 1998

B.A. Hons Degree in Sociology/ Philosophy

University College Cork, 1996

B.A. Hons Degree Sociology

University of Warwick, 1995

EMPLOYMENT

C.O.O. Future iQ

USA and Europe, 2012 – Present

Managing Director Future iQ Europe, Ltd

Europe, 2012 - Present

Manager, Govt. Employment Service

Ireland, 2003 – 2012

Animal Welfare Policy Chair

Green Party Ireland, 2003 – 2009

future→iQ

Create **Future Intelligence**™

www.future-iq.com

CELINE BEURLE B.A., M.A.

CHIEF OPERATING OFFICER

Celine Beurle is Chief Operating Officer (COO) of Future iQ. Celine is the key project co-ordinator within Future iQ and works as the main point person from Future iQ with clients on the co-ordination and details of many of the larger projects from start to finish.

As Joint Owner and Managing Director of Future iQ, Celine has expanded the company since 2012 across Europe (including South America, Italy, Spain, Portugal and the UK). Celine had an academic background to Masters level in both Sociology and Philosophy. As Future iQ's COO, Celine works with the CEO on the overall strategic direction of Future iQ. The academic background that Celine has excelled in, has enabled her to provide the often needed "societal lens" for many of Future iQ's projects.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024 -2025
- Lorain County Strategic Action Plan Task Force and Actions, Ohio, 2024
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023 - 2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Cornell College Strategic Roadmap Development, Iowa, 2023
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Park City Vision 2020, Utah, 2019-2020
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charrette and Regional Planning Initiative, Georgia, 2018
- Coppell Vision 2040,Texas, 2018
- Hilton Head Island Visioning, South Carolina, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, 2016-2017
  Griffith Foods Scenario Planning, Chicago, USA, 2016
- Mediterranean PORTS EU Projects, Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, 2014-2015
- Australian Grain Research and Development Corporation, Western Australia, 2008-2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- LSCOG Strategic Action Plan Think-Tank Report, 2024
- City of Sugar Land Strategic Action Plan Think-Tank Report, 2024
- City of Essex Junction Strategic Action Plan, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- Lorain County Strategic Action Plan, 2024
- City of Essex Junction Think-Tank Report, 2023
- Cornell College Strategic Roadmap Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- Moab - Tomorrow Together Think-Tank Report, 2022
- Park City Vision 2020 Final Vision and Strategic Action Report, 2021
- Middle Georgia Innovation Framework and Ecosystem Report, 2021
- Middle Georgia Innovation Roadmap Report, 2021
- Middle Georgia Innovation Corridor Report, 2021
- Park City Vision 2020 Think-Tank Report, 2019
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- Future iQ Project Communication Plan - Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Monterspertoli Scenario Planning Report, 2014

9.4 Heather Branigin, Vice President, Foresight Research, Future iQ

RÉSUMÉ

heather@future-iq.com

EDUCATION

Master of Arts in Teaching
Secondary Level, Social Studies

University of St. Thomas, MN
Bachelor of Arts in Political Science/ International Relations
Advanced Language Certificate: French Literature
Carleton College, MN
Honours Degree, Neuchâtel Jr. College, Neuchâtel, Switzerland

EMPLOYMENT

Vice President, Foresight Research, Future iQ, 2016-present
City of Edina, MN, 2013-2016
NCCA-National Model United Nations, Minneapolis, MN, 2010-2013
UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Volunteer Judge, Future City Competition, 2017

Co-President (2011-2013); Board Member (2010, 2014) UNA-MN

Board Member and Secretary, Caring for Cats, 2019-2021

Advisory Council Member, UNA-MN, 2014-present

future→iQ
Create Future Intelligence™
www.future-iq.com

HEATHER BRANIGIN B.A., M.A.T.

VICE PRESIDENT, FORESIGHT RESEARCH

Heather leads Future iQ's research projects and proposal writing, most recently co-authoring The Future of Wellbeing and The Future of Urban Living. She has extensive experience in local government and the nonprofit sector and is an accomplished project manager. Heather has a well-developed ability to assimilate information into thoughtful and coherent report and proposal writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather provides critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerated change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE

- Jasper Comprehensive Plan, IN 2025-2026
- NH Community Dev. Finance Authority Community Dev. Block Grant (CDBG) Update, 2025
- Greenwood Comprehensive Master Plan, MO, 2024-2025
- Keene Comprehensive Master Plan, NH 2024-2025
- Pflugerville Strategic Action Plan, TX 2025
- Sugar Land Strategic Action Plan, TX, 2025
- COSCDA Strategic Action Plan and Implementation Assistance, Washington, DC, 2023-2025
- Littleton Comprehensive Economic Development Strategy, CO, 2023-2024
- Unified Government of WYCO-KCK Economic Development Strategic Plan, KS 2023
- MN Dept. of HHS, Age-Friendly MN TAP Grant, 2023-2026
- Smithville School District Strategic Action Plan, MO, 2022-2023
- The Future of Wellbeing, MN, 2022
- Transforming Tomorrow Together - Greater Mankato 2030, MN, 2022-2024
- University City Community Vision 2040 Strategic Roadmap, MO, 2022
- ECICOG Comprehensive Economic Development Strategy, IA, 2022
- Falmouth Vision and Values, ME, 2022
- Greater Bemidji Strategic Action Plan Update, MN, 2022
- IMEC Future of Manufacturing in Illinois, 2022
- The Middle Georgia Innovation Project, 2021
- Smithville Parks & Rec Master Plan 2030, MO, 2021
- Denton Comp. Solid Waste Management Strategy, TX, 2021
- The Future of Chiropractic Strategic Visioning, OR 2021
- Smithville Comprehensive Plan, MO, 2020
- Kinship Fellows and Food: Land: Opp. Grantees Summit, IL, 2020
- Trotwood Organizational Strategic Plan, OH 2019
- New North Business Intelligence Strategic Action Plan, WI, 2019
- Mitchell Community Vision and Action Plan, SD, 2019
- Future of Urban Living, Windsor Castle, UK, 2018
- IDNR Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2019
- Tillamook Co. Strategic Action Plan, OR, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO Strategic Action Plan, Washington, D.C., 2019
- Coppell Vision 2040, TX, 2019
- San Diego, OEA Grant Facilitation, CA, 2016-2019
- Snohomish Co Regional Tourism Destination Dev., WA, 2018
- McHenry County College Strategic Foresight, IL, 2018
- NHADEC Strategic Plan, 2018
- Waseca Vision 2030, MN, 2018
- Univ. of Minnesota, Future of Midwest Agriculture, MN, 2017
- City of Edina, Vision Edina, MN, 2015

RECENT PUBLICATIONS

- Greenwood Community Vision, 2025
- Keene 2025 Comprehensive Master Plan, 2025
- Vision Keene Community Vision, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton Comprehensive Economic Strategic Plan, 2024
- PlanKCK Economic Dev. Strategic Plan, 2023
- Smithville School District Strategic Action Plan, 2023
- Greater Mankato Think-Tank Report, 2023
- The Future of Wellbeing in Minnesota, 2022
- Envision East Central Iowa CEDS Plan, 2022
- University City Community Vision 2040, 2022
- Greater Bemidji Strategic Action Plan Report, 2022Town of Falmouth Vision and Values Final Report, 2022
- The Future of Manufacturing in Illinois, 2022
- The Future of Chiropractic, 2021
- Smithville Parks and Recreation Master Plan, 2021
- Middle Georgia Innovation Performance and Gap Analysis Report Part 1: Case Studies, 2021
- Smithville Comprehensive Plan, 2020
- Kinship Fdtn. Future of Local Food Systems & Sust.Ag, 2020
- IDNR Sustainable Materials Management - Vision for Iowa,2019NADO Strategic Action Plan, 2019
- Trotwood Organizational Strategic Plan, 2019
- The Future of Urban Living, 2019
- The Future of Tourism – Maine Woods, 2018
- NHADEC Strategic Action Plan, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017
- The Future of Food, 2016

9.5 Brittany Rempe, Creative Director, Future iQ

RÉSUMÉ

brittany@future-iq.com

EDUCATION

Bachelor of Arts in Public Relations - Simpson College, 2015

EMPLOYMENT

Creative Director - Future iQ, 2022-present

Communications Specialist - East Central Iowa Council of Governments 2020-2022

Marketing Communications Coordinator - Herzog Technologies, Inc., 2015-2020

AWARDS/RECOGNITION

Summa Cum Laude

Simpson College Outstanding Senior, Integrated Marketing Communications

LEADERSHIP EXPERIENCE

Photo Editor, Simpsonian

Co-Founder, Smoky Room Films

Alumnae Advisory Council - Pi Beta Phi

future→iQ
Create **Future Intelligence**™
www.future-iq.com

BRITTANY REMPE B.A. PUBLIC RELATIONS

CREATIVE DIRECTOR

Brittany Rempe is Future iQ's Creative Director. Alongside a degree in Public Relations and nine years in communications and design, Brittany has a love of branding and a creative heart. These combine well with a multi-faceted skillset, including graphic design, photography, videography, copy writing and web design. Brittany uses experience and an imaginative eye to strengthen Future iQ's projects, delighting in the buildout of project identities and accounting for client personality and existing brands. Throughout each project, Brittany offers communications planning, event capture, web design and strong, clear visuals.

RECENT PROJECT EXPERIENCE

- Abbeville County Strategic Action Plan, South Carolina, 2024-2025
- Greenwood Comprehensive Master Plan, MO, 024-2025
- City of Sugarland Strategic Action Plan, Texas, 2024-2025
- City of Traverse City Strategic Action Plan, Michigan, 2024-2025
- Lower Savannah Council of Governments, South Carolina, 2024-2025
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- New England Regional Defense Industry Collaboration, New England, 2019-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023-2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- Transforming Tomorrow Together - Greater Mankato 2040, Minnesota, 2022
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Florida Adventure Network Mapping, Florida, 2022
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- East Central Iowa Council of Governments Comprehensive Economic Development Strategy Update, Iowa, 2022
- The Future of Wellbeing Foresight Project, Minnesota, 2022
- University City Community Vision 2040, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy; New England, USA
- Town of Falmouth Vision and Values; Falmouth, ME
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- Park City Vision 2020, Utah USA

RELEVANT PUBLICATIONS

- Lorain County Task Force Actions Report, 2024
- Vision Keene 20-Forward Think-Tank Report, 2024
- City of Essex Junction Strategic Plan, 2024
- City of Trotwood Community Communications Report, Plan and Toolkit, 2024
- The Future of the Vermont Forest Industry Strategic Plan, 2024
- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- Lorain County Strategic Action Plan, 2024
- PlanKCK Economic Development Strategy, 2023
- City of Essex Junction Think-Tank Report, 2023
- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- University City Community Vision Final Report, 2022

9.6 Tobiloba Adaramati, Data Analyst, Future iQ

RÉSUMÉ

tobiloba@future-iq.com

EDUCATION

B.Tech. (First Class) Degree in Mathematics Education

Federal University of Technology, Minna, 2015 N.C.E Degree in Computer and Mathematics

Federal College of Education (Technical), Akoka, 2011

EMPLOYMENT

Data Analyst. Future iQ

USA and Europe, 2017 – Present

Results Measurement Expert. JMSF Agribusiness, Nigeria, 2018 – Present

CEO. Growth Analytics Consulting Nigeria, 2017 – Present

Monitoring and Evaluation Analyst.

Solina Group, Nigeria, 2016 – 2017

Research Analyst. Solina Group Nigeria, 2015 – 2016

future→iQ

Create **Future Intelligence**™

www.future-iq.com

TOBILOBA ADARAMATI

DATA ANALYST

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

RECENT PROJECT EXPERIENCE

- City of Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- City of Sugar Land Strategic Action Plan, Texas, 2024-2025
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- City of Smithville Visioning, Missouri, 2019
- Edina Medical and Well-Being Destination Strategic Marketing Plan, Minnesota, 2018
- Coppell Vision 2040, Texas, 2018

9.7 Walter Paixao-Cortes, Data Engineer, Future iQ

RÉSUMÉ

walter@future-iq.com

WALTER R. PAIXÃO-CÔRTES M.A., B.A.

DATA ENGINEER

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing. Walter has been working with Future iQ since 2017 on every project, turning every survey result into filterable data visualization platforms which ensures clients and stakeholders can view survey results and filter and manipulate them in a meaningful way.

EDUCATION

Doctorate in Computer Science (Bioinformatics/Natural Language Processing)

Pontifical Catholic University of Rio Grande do Sul, 2015 to present

Masters Degree in Computer Science (Bioinformatics)

Pontifical Catholic University of Rio Grande do Sul 2013 – 2015

Bachelors Degree in Computer Science

Pontifical Catholic University of Rio Grande do Sul, 1995 – 2002

EMPLOYMENT

Data Engineer – Future IQ, 2017 – present

Senior Software Engineer – Dell Computers, Brazil, 2000 – present

Software Engineer – Accenture, Brazil, 2003 – 2005

RECENT PROJECT EXPERIENCE

- Pflugerville Strategic Action Plan, Texas, 2025
- Greenwood Comprehensive Master Plan, Missouri, 2024-2025
- Abbeville County Strategic Action Plan, Sourth Carolina, 2024-2025
- LSCOG Strategic Action Plan, South Carolina, 2024
- City of Sugar Land Strategic Action Plan, Texas, 2024
- Keene Comprehensive Master Plan, New Hampshire, 2024-2025
- Lorain County Strategic Action Plan, Ohio, 2023-2024
- Madison F35 Community Connection, Wisconsin, 2023-2024
- City of Essex Junction Strategic Action Plan, Vermont, 2023-2024
- COSCDA Strategic Action Plan, Washington DC, 2023- 2024
- Age Friendly MNTAP Grant, Minnesota, 2023-2024
- Trotwood Community Communications, Ohio, 2023-2024
- Park City Bonanza Park Planning, Utah, 2023-2024
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Flint Hills Regional Council Sustainablility Plan and Roadmap, Kansas, 2023
- Transforming Tomorrow Together - Greater Mankato 2040, 2022-2023
- Florida Adventure Network Mapping, 2022
- Romulus- Our Community, Our Future, Michigan, 2022
- Moab - Tomorrow Together, Utah, 2022
- East Central Iowa Council of Governments, Iowa, 2021-2022
- University City Community Vision 2040, Missouri, 2021-2022
- City of Smithville Transportation Master Plan, Missouri, 2021 - 2022
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, 2019
- New England Regional Defense Industry Collaboration Initiative, New England, 2019-2023
- City of Smithville Visioning and Strategic Action Plan project, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- Snohomish County Regional Tourism Destination Development, WA. 2018
- McHenry County College, Crystal Lake, IL. 2018
- Middle Georgia Charrette and Regional Planning, Georgia. 2018
- Coppell Vision 2040, Coppell, Texas. 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN. 2017-2018
- Hilton Head Island Our Future, South Carolina. 2017-2018

future→iQ
Create Future Intelligence™
www.future-iq.com

CITY OF LAKE GENEVA, WISCONSIN
RFP FOR STRATEGIC PLANNING SERVICES

AUGUST 27, 2025
COST PROPOSAL

STRATEGIC ACTION PLAN PRICING

future→iQ
Create Future Intelligence™

Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Pricing Proposals

City of Lake Geneva Strategic Plan and Governance Structure RFP

Company Name: Future iQ, Inc.

Strategic Plan: $35,000 (not to exceed)

Cost Breakdown:

Phase 1: Initial Planning and Project Set-Up	$ 7,000
(Workplan/Project Portal/Engagement Plan/Environmental Scan/Meetings)	
Phase 2: Stakeholder Engagement	$ 14,000
(Community Survey/Interviews/Data Visualization/Think-Tank/Think Tank Report)	
Phase 3: Plan Development	$ 14,000
(Focus Groups/Draft and Final Strategic Action Plan with Implementation Matrix)	
(See optional items on next page for additional costs)	
Total:	$35,000

By signing this document, I am acknowledging that my firm understands the project is to be completed by December 22, 2025, unless otherwise agreed upon during contract negotiations.

Heather Branigin — August 26, 2025

Signature — Date

Future iQ – Cost Proposal with Additional Options for Stakeholder Engagement

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director and all staff. We assume that the City of Lake Geneva will provide venues for workshop sessions and presentations, as required. Please note that our fees and project plan are flexible and easily scalable depending on the needs of Lake Geneva. As requested in the RFP, this Cost Proposal also includes pricing for additional stakeholder engagement if desired by the City.

Key Phases	Key Deliverables	Core Tasks	Optional Tasks
Phase 1: Initial Planning and Project Kickoff	• Detailed work plan and schedule • Create online project lab portal; project branding • Engagement Plan • Environmental Scan • Strategic planning meetings	$0 $2,000 $1,000 $1,000 $2,000 $1,000	
Phase 2: Community Engagement	• Community Survey • Key stakeholder interviews • Data visualization on portal • Lake Geneva Think-Tank Workshop • Lake Geneva Think-Tank Report • Community Visioning Sessions*	$2,000 $1,000 $2,000 $7,000 $2,000	$10,000
Phase 3: Plan Development	• Roundtable Session with City Council and Staff* • Focus Groups to develop Strategic Pillars and Action Areas • Prioritization Survey* • Draft, develop and finalize Lake Geneva Strategic Action Plan with Implementation Matrix • Future Summit Presentation*	$8,000 $6,000	$3,000 $2,000 $3,000
TOTAL	**FIXED PRICE PROPOSAL**	**$35,000**	**$18,000**

Includes ongoing project management work, including weekly/bi-weekly meetings with client liaison, Board meetings, project portal updates and management to a detailed work plan.

*Indicates optional tasks that may be added to the planning process to strengthen the outcome of the project. It should be noted that addition of some of these items could potentially lengthen the strategic planning timeframe.

Proposed payment schedule:

- 25% on signing of contract
- 25% on completion of phases 1, 2, and 3

Report Criteria:
Detail report.
Invoices with totals above $0.00 included.
Paid and unpaid invoices included.
Invoice.Batch = "09192025","09162025PD","09182025","09262025","09302025","10032025"

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
ALLIANT ENERGY/WPL				
AUG 2025-08	08/29/2025	GENEVA SQUARE-TRAFFIC LIG	11-34-10-52220 ELECTRICITY-FLASHERS	70.90
AUG 2025-08	08/29/2025	HAVENWOOD FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	12.90
AUG 2025-08	08/29/2025	SOUTH/WELLS FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	18.97
AUG 2025-08	08/29/2025	WELLS STREET FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	19.91
AUG 2025-08	08/29/2025	MAIN STREET LIGHTS	11-34-10-52230 STREET LIGHTS ELECTRICITY	159.98
AUG 2025-08	08/29/2025	1055 CAREY	11-32-10-52220 ST DEPT BLDG ELECTRICITY	121.98
AUG 2025-08	08/29/2025	CITY HALL	11-16-10-52220 CITY HALL ELECTRICITY	4,410.46
AUG 2025-08	08/29/2025	VETS PARK PAVILION	11-52-01-52220 VETS PARKS ELECTRICITY	232.05
AUG 2025-08	08/29/2025	DONIAN PK	11-52-00-52220 PARKS ELECTRICITY	124.50
AUG 2025-08	08/29/2025	COBB PARK	11-52-00-52220 PARKS ELECTRICITY	26.19
AUG 2025-08	08/29/2025	1070 CAREY ST	11-32-10-52220 ST DEPT BLDG ELECTRICITY	730.63
AUG 2025-08	08/29/2025	FLAT IRON PARK-WRIGLEY DR	11-52-00-52220 PARKS ELECTRICITY	47.90
AUG 2025-08	08/29/2025	DODGE STREET FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	13.37
AUG 2025-08	08/29/2025	IMPOUND-1070 CAREY ST	11-21-00-52220 POLICE IMPOUND BLDG ELECTRIC	24.41
AUG 2025-08	08/29/2025	FIRE HOUSE-730 MARSHALL	11-22-00-52220 FIREHOUSE ELECTRICITY	1,428.37
AUG 2025-08	08/29/2025	HWY 120/TOWNLINE RD STOP	11-34-10-52220 ELECTRICITY-FLASHERS	51.80
AUG 2025-08	08/29/2025	700 GENEVA STREET PARKING	11-34-10-52230 STREET LIGHTS ELECTRICITY	168.42
AUG 2025-08	08/29/2025	1065 CAREY ST	11-32-10-52220 ST DEPT BLDG ELECTRICITY	669.32
AUG 2025-08	08/29/2025	VETS PARK SCOREBOARD	11-52-01-52220 VETS PARKS ELECTRICITY	159.86
AUG 2025-08	08/29/2025	BAKER/SEMINARY RESTROOM	11-52-00-52220 PARKS ELECTRICITY	26.04
AUG 2025-08	08/29/2025	HWY 50 TRAFFIC LIGHT	11-34-10-52230 STREET LIGHTS ELECTRICITY	79.62
AUG 2025-08	08/29/2025	GEORGE STREET FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	13.37
AUG 2025-08	08/29/2025	COOK ST/HWY 50 TRAFFIC SIG	11-34-10-52230 STREET LIGHTS ELECTRICITY	44.54
AUG 2025-08	08/29/2025	SIREN-730 MARSHALL STREET	11-29-00-52220 SIRENS ELECTRICTY	29.66
AUG 2025-08	08/29/2025	TENNIS COURTS	11-52-00-52220 PARKS ELECTRICITY	46.44
AUG 2025-08	08/29/2025	389 EDWARDS TRAFFIC LIGHT	11-34-10-52230 STREET LIGHTS ELECTRICITY	95.22
AUG 2025-08	08/29/2025	HWY 50/HWY 12 STOP LIGHT	11-34-10-52220 ELECTRICITY-FLASHERS	42.47
AUG 2025-08	08/29/2025	RUSHWOOD PARK	11-52-00-52220 PARKS ELECTRICITY	29.94
AUG 2025-08	08/29/2025	FLAT IRON PARK-WRIGLEY DR	11-52-00-52220 PARKS ELECTRICITY	493.64
AUG 2025-08	08/29/2025	W HWY 50 BLOCK FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	17.36
AUG 2025-08	08/29/2025	LIBRARY PARK RESTROOM	11-52-00-52220 PARKS ELECTRICITY	89.47
AUG 2025-08	08/29/2025	724 WILLIAMS STREET	11-34-10-52230 STREET LIGHTS ELECTRICITY	44.67
AUG 2025-08	08/29/2025	S LAKE SHORE DRIVE FLASHE	11-34-10-52220 ELECTRICITY-FLASHERS	13.37
AUG 2025-08	08/29/2025	S LAKE SHORE DRIVE	11-52-00-52220 PARKS ELECTRICITY	68.02
AUG 2025-08	08/29/2025	MUSEUM-256 MILLS STREET	11-51-10-52220 MUSEUM-ELECTRICITY	1,202.41
AUG 2025-08	08/29/2025	WELLS STREET FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	16.74
AUG 2025-08	08/29/2025	HOST DRIVE WATER TOWER	11-22-00-52220 FIREHOUSE ELECTRICITY	166.14
AUG 2025-08	08/29/2025	LIBRARY-918 MAIN STREET	99-00-00-52220 LIBRARY UTILITIES	1,304.89
AUG 2025-08	08/29/2025	LOT LITE-GENEVA ST	11-34-10-52230 STREET LIGHTS ELECTRICITY	171.36
AUG 2025-08	08/29/2025	WELLS STREET LIGHT	11-34-10-52220 ELECTRICITY-FLASHERS	81.65
AUG 2025-08	08/29/2025	DUNN FIELD	11-52-00-59220 DUNN FIELD ELECTRIC	61.88
AUG 2025-08	08/29/2025	SNAKE RD/HWY 50 FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	17.36
AUG 2025-08	08/29/2025	VETS PARK/TOWNLINE RD	11-52-01-52220 VETS PARKS ELECTRICITY	233.73
AUG 2025-08	08/29/2025	1067 CAREY-STORAGE BUILDI	11-21-00-52220 POLICE IMPOUND BLDG ELECTRIC	20.79
AUG 2025-08	08/29/2025	1067 CAREY-STORAGE BUILDI	11-22-00-52220 FIREHOUSE ELECTRICITY	20.78
AUG 2025-08	08/29/2025	N BLOOMFIELD RD & HARMON	11-34-10-52230 STREET LIGHTS ELECTRICITY	4.08
AUG 2025-08	08/29/2025	HWY 120/BLOOMFIELD RD TRA	11-34-10-52230 STREET LIGHTS ELECTRICITY	100.62
AUG 2025-08	08/29/2025	LIBRARY PARK OUTSIDE	11-52-00-52220 PARKS ELECTRICITY	65.71
AUG 2025-08	08/29/2025	EDWARDS BLVD/WALMART TR	11-34-10-52230 STREET LIGHTS ELECTRICITY	88.37
AUG 2025-08	08/29/2025	HAVENWOOD DR/MAIN STREE	11-34-10-52230 STREET LIGHTS ELECTRICITY	86.81

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
AUG 2025-08	08/29/2025	SAGE ST/DUNN SIREN	11-29-00-52220 SIRENS ELECTRICTY	5.78
AUG 2025-08	08/29/2025	STREET LIGHTS MS-2 LIGHTIN	11-34-10-52230 STREET LIGHTS ELECTRICITY	342.01
AUG 2025-08	08/29/2025	BROAD ST TRAFFIC SIGNAL	11-34-10-52230 STREET LIGHTS ELECTRICITY	93.54
AUG 2025-08	08/29/2025	HWY 50/HWY 12 FLASHER	11-34-10-52220 ELECTRICITY-FLASHERS	17.36
AUG 2025-08	08/29/2025	WEST COOK SIREN	11-29-00-52220 SIRENS ELECTRICTY	19.91
AUG 2025-08	08/29/2025	RIVIERA ELECTRIC	40-55-30-52220 PIER ELECTRIC	4,424.45
AUG 2025-08	08/29/2025	BEACH HOUSE	40-54-10-52220 BEACH ELECTRIC	606.25
AUG 2025-08	08/29/2025	INTERCHANGE N TRAFFIC SIG	11-34-10-52230 STREET LIGHTS ELECTRICITY	56.05
SEP 2025	09/23/2025	OAK HILL CEMETERY	48-00-00-52220 CEM ELECTRICITY EXP	32.86
SEP2025	09/23/2025	OAK HILL CEMETERY	48-00-00-52220 CEM ELECTRICITY EXP	50.34
Total ALLIANT ENERGY/WPL:				18,917.62
AMAZON CAPITAL SERVICES				
89C4-AUG 202	09/17/2025	CREDIT MEMO	99-00-00-54100 LIBRARY ADULT MATERIALS	3.80-
89C4-AUG 202	09/17/2025	CREDIT MEMO	99-00-00-54100 LIBRARY ADULT MATERIALS	17.13-
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	99-00-00-53100 LIBRARY OFFICE SUPPLIES	17.09
89C4-AUG 202	09/17/2025	ADULT MATERIALS	99-00-00-54100 LIBRARY ADULT MATERIALS	14.29
89C4-AUG 202	09/17/2025	THE IDAHO FOUR-REIMB FROM	99-00-00-52110 GENERAL ADMIN EXPENSES	20.75
89C4-AUG 202	09/17/2025	PLASTIC TABLE CLOTHS REIM	99-00-00-52110 GENERAL ADMIN EXPENSES	79.15
89C4-AUG 202	09/17/2025	SCOTCH TAPE	11-16-10-53100 CITY HALL OFFICE SUPPLIES	70.34
89C4-AUG 202	09/17/2025	TONER CARTRIDGE	11-16-10-53100 CITY HALL OFFICE SUPPLIES	123.42
89C4-AUG 202	09/17/2025	MISC DISCOUNT	11-16-10-53100 CITY HALL OFFICE SUPPLIES	.40-
89C4-AUG 202	09/17/2025	MOUSE PAD	11-16-10-53100 CITY HALL OFFICE SUPPLIES	4.74
89C4-AUG 202	09/17/2025	MECHANICAL PENCILS	11-15-10-53100 OFFICE SUPPLIES	15.29
89C4-AUG 202	09/17/2025	FILE FOLDER TOTE	40-52-11-53520 LAUNCH RAMP MAINT SUPPLIES	15.66
89C4-AUG 202	09/17/2025	CLIPBOARD W/CALULATOR	40-52-11-53520 LAUNCH RAMP MAINT SUPPLIES	29.99
89C4-AUG 202	09/17/2025	POST IT POP UPS	11-16-10-53100 CITY HALL OFFICE SUPPLIES	27.38
89C4-AUG 202	09/17/2025	DYMO MAILING LABLES	11-16-10-53100 CITY HALL OFFICE SUPPLIES	22.99
89C4-AUG 202	09/17/2025	ADDING MACHINE ROLL	11-16-10-53100 CITY HALL OFFICE SUPPLIES	15.99
89C4-AUG 202	09/17/2025	GEL PENS	11-15-10-53100 OFFICE SUPPLIES	12.80
89C4-AUG 202	09/17/2025	MOUSE PAD	11-15-10-53100 OFFICE SUPPLIES	8.95
89C4-AUG 202	09/17/2025	MOUSE PAD	11-15-10-53100 OFFICE SUPPLIES	7.99
89C4-AUG 202	09/17/2025	USB FLASH DRIVES	11-16-10-53100 CITY HALL OFFICE SUPPLIES	28.79
89C4-AUG 202	09/17/2025	BIG TAB DIVIDERS	11-15-10-53100 OFFICE SUPPLIES	15.76
89C4-AUG 202	09/17/2025	DRY ERASE MARKERS	11-52-00-53400 PARKS OPERATING SUPPLIES	3.59
89C4-AUG 202	09/17/2025	PRINTABLE BUSINESS CARDS	11-16-10-53100 CITY HALL OFFICE SUPPLIES	14.09
89C4-AUG 202	09/17/2025	HDMI CABLE	11-14-20-53100 CITY ADMIN OFFICE SUPPLIES	23.74
89C4-AUG 202	09/17/2025	EXPANDING FILE	11-24-00-53100 BLDG INSPECTOR OFFICE SUPPLIES	17.89
89C4-AUG 202	09/17/2025	EXPANDING FILE	11-24-00-53100 BLDG INSPECTOR OFFICE SUPPLIES	15.69
89C4-AUG 202	09/17/2025	ENGRAVED PLATE	11-16-10-53100 CITY HALL OFFICE SUPPLIES	15.91
89C4-AUG 202	09/17/2025	COPY PAPER	11-24-00-53100 BLDG INSPECTOR OFFICE SUPPLIES	59.88
89C4-AUG 202	09/17/2025	COPY PAPER	42-34-50-53100 OFFICE SUPPLIES	59.88
89C4-AUG 202	09/17/2025	COPY PAPER	11-14-30-53100 CITY CLERK OFFICE SUPPLIES	119.76
89C4-AUG 202	09/17/2025	COPY PAPER	11-15-10-53100 OFFICE SUPPLIES	119.76
89C4-AUG 202	09/17/2025	ETHERNET SWITCH-JEREMY	11-15-10-54500 COMPUTER IT SVC & EQUIPMENT	12.99
89C4-AUG 202	09/17/2025	DRY ERASE ERASER	11-52-00-53400 PARKS OPERATING SUPPLIES	2.58
89C4-AUG 202	09/17/2025	JACK W/DRILL POWERED OPE	11-22-00-51400 FIRE CITY CALL PAY	179.55
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	11-12-00-53100 MUNICIPAL CT OFFICE SUPPLIES	31.50
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	11-12-00-53100 MUNICIPAL CT OFFICE SUPPLIES	17.42
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	11-12-00-53100 MUNICIPAL CT OFFICE SUPPLIES	31.78
89C4-AUG 202	09/17/2025	STAPLER	11-14-20-53100 CITY ADMIN OFFICE SUPPLIES	20.66
89C4-AUG 202	09/17/2025	HDMI FEMALE COUPLER	11-14-20-53100 CITY ADMIN OFFICE SUPPLIES	6.99
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-53400 OPERATING SUPPLIES	63.80
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-53500 BLDG MAINT SUPPLIES-FIREHOUSE	28.98
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-51380 FIRE DEPT UNIFORMS	649.90
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-58100 EMS EQUIPMENT/SUPPLIES	25.01

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-58110 SPECIALIZED TEAMS EQUIP/SUP	71.64
89C4-AUG 202	09/17/2025	MISC SUPPLIES	11-22-00-58000 FIRE EQUIPMENT/SUPPLIES	285.88
89C4-AUG 202	09/17/2025	COPY PAPER, THERMAL ROLL	61-00-00-53100 OFFICE SUPPLIES EXPENSE	81.08
89C4-AUG 202	09/17/2025	COPY PAPER, THERMAL ROLL	62-00-00-92100 OFFICE SUPPLIES & EXPENSE	81.08
89C4-AUG 202	09/17/2025	SPOTLIGHTS FOR TRUCKS	62-00-00-66500 MISC EXPENSE LICENSE & TOOLS	151.96
89C4-AUG 202	09/17/2025	PRESSURE WASHER TURBO N	62-00-00-66500 MISC EXPENSE LICENSE & TOOLS	13.99
89C4-AUG 202	09/17/2025	LED BULBS PLANT B TREATME	62-00-00-65100 PLANT MAINTENANCE	233.99
89C4-AUG 202	09/17/2025	IGNITION COIL CUTOFF SAW	62-00-00-66500 MISC EXPENSE LICENSE & TOOLS	19.59
89C4-AUG 202	09/17/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	49.82
89C4-AUG 202	09/17/2025	NITRILE GLOVES	61-00-00-53900 FIRST AID & SAFETY SUPPLIES	76.44
89C4-AUG 202	09/17/2025	AMP FUSE	61-00-00-93602 MAINT-DIGESTERS EQUIP	56.83
89C4-AUG 202	09/17/2025	FRONT WHEEL GREASE CAPS	61-00-00-93700 MAINT-VEHICLES & EQUIP	22.57
89C4-AUG 202	09/17/2025	HONEYWELL PRESSURE SWIT	61-00-00-93800 MAINT-LIFT STATIONS	113.82
89C4-AUG 202	09/17/2025	SWITCH POLE, TOGGLE FOR M	62-00-00-93200 MAINTENANCE OF GENERAL PLANT	7.04
89C4-AUG 202	09/17/2025	YOUTH MATERIALS	99-00-00-54110 LIBRARY YOUTH MATERIALS	157.92
89C4-AUG 202	09/17/2025	BOOKS REIMB BY DONATIONS	99-00-00-52110 GENERAL ADMIN EXPENSES	26.30
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	99-00-00-53100 LIBRARY OFFICE SUPPLIES	85.55
89C4-AUG 202	09/17/2025	CUTTING BOARDS, ETC REIMB	99-00-00-52110 GENERAL ADMIN EXPENSES	97.25
89C4-AUG 202	09/17/2025	BOOKMOBILE SUPPLIES	43-99-00-17010 LIBRARY CAPITAL PROJECTS	170.36
89C4-AUG 202	09/17/2025	ADULT MATERIALS	99-00-00-54100 LIBRARY ADULT MATERIALS	363.04
89C4-AUG 202	09/17/2025	ACRYLIC SEALER REIMB BY D	99-00-00-54150 LIBRARY PROGRAMS	91.70
89C4-AUG 202	09/17/2025	LARGE TOTE	99-00-00-55120 LIBRARY PROCESSING SUPPLIES	22.02
89C4-AUG 202	09/17/2025	STICKY NOTES	99-00-00-53100 LIBRARY OFFICE SUPPLIES	7.59
89C4-AUG 202	09/17/2025	ADULT MATERIALS	99-00-00-54100 LIBRARY ADULT MATERIALS	496.15
89C4-AUG 202	09/17/2025	RHINESTONES REIMB BY DON	99-00-00-52110 GENERAL ADMIN EXPENSES	82.87
89C4-AUG 202	09/17/2025	BOOKS REIMB BY FRIENDS	99-00-00-52110 GENERAL ADMIN EXPENSES	166.44
89C4-AUG 202	09/17/2025	COPY PAPER REIMB BY FRIEN	99-00-00-52110 GENERAL ADMIN EXPENSES	79.99
89C4-AUG 202	09/17/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	206.36
89C4-AUG 202	09/17/2025	MAINTENANCE SUPPLIES	99-00-00-53500 LIBRARY MAINT SUPPLIES	182.97
89C4-AUG 202	09/17/2025	OFFICE SUPPLIES	99-00-00-53100 LIBRARY OFFICE SUPPLIES	12.17
89C4-AUG 202	09/17/2025	POTS FOR PLANTS	99-00-00-52110 GENERAL ADMIN EXPENSES	105.79
89C4-AUG 202	09/17/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	48.42
Total AMAZON CAPITAL SERVICES:				5,700.01
AT&T				
25213-AUG	08/01/2025	ETHERNET-AUG	11-21-00-52210 PD TELEPHONE EXPENSE	338.90
262248471509	09/13/2025	RIVIERA ELEVATOR	40-55-20-52210 RIVIERA ELEVATOR PHONE EXPENSE	209.55
262248471509	09/13/2025	RIVIERA ELEVATOR	40-55-20-52210 RIVIERA ELEVATOR PHONE EXPENSE	205.09
262248471509	09/13/2025	CITY HALL-PORTS	11-16-10-52210 CITY HALL TELEPHONE	419.10
262248471509	09/13/2025	POLICE-911 MODEM	11-21-00-52620 PD COMMUNICATION SYS MAINT FEE	424.60
262248471509	09/13/2025	FIRE DEPT	11-22-00-52210 FIRE TELEPHONE EXPENSE	419.10
262249529909	09/16/2025	LIBRARY - 6 LINES	99-00-00-52210 LIBRARY TELEPHONE EXP	496.44
262249529909	09/16/2025	STREET - 1 LINE	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	82.74
262249529909	09/16/2025	COURT FAX	11-12-00-52210 MUNICIPAL CT TELEPHONE	82.74
262249529909	09/16/2025	CITY HALL-ALARM LINES	11-16-10-52210 CITY HALL TELEPHONE	82.74
262249529909	09/16/2025	CEMETERY - 1 LINE	48-00-00-52210 CEM TELEPHONE EXP	82.74
262249529909	09/16/2025	LOWER RIVIERA - 1 LINE	40-55-20-52210 RIVIERA ELEVATOR PHONE EXPENSE	82.74
262249529909	09/16/2025	UPPER RIVIERA - 2 LINES	40-55-10-52210 TELEPHONE EXPENSE	165.48
262249529909	09/16/2025	FIRE DEPT - 2 LINES	11-22-00-52210 FIRE TELEPHONE EXPENSE	165.48
262249529909	09/16/2025	POLICE - 3 LINES	11-21-00-52210 PD TELEPHONE EXPENSE	248.29
262R72091109	09/01/2025	911-	11-21-00-52620 PD COMMUNICATION SYS MAINT FEE	2,600.00
S660270270-2	09/01/2025	ETHERNET-SEPT	11-21-00-52210 PD TELEPHONE EXPENSE	338.90
Total AT&T:				6,444.63

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
AT&T LONG DISTANCE				
816988240-08	09/04/2025	262-248-8617	61-00-00-53110 TELEPHONE EXPENSE	.29
816988240-08	09/04/2025	262-248-2789	48-00-00-52210 CEM TELEPHONE EXP	37.71
816988240-08	09/04/2025	262-248-6644	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	77.46
816988240-08	09/04/2025	262-248-6075	11-22-00-52210 FIRE TELEPHONE EXPENSE	132.75
816988240-08	09/04/2025	262-248-7228	11-22-00-52210 FIRE TELEPHONE EXPENSE	32.34
816988240-08	09/04/2025	262-249-5282	99-00-00-52210 LIBRARY TELEPHONE EXP	56.91
816988240-08	09/04/2025	262-248-4715	11-16-10-52210 CITY HALL TELEPHONE	1.02
Total AT&T LONG DISTANCE:				338.48
AT&T MOBILITY				
287305036061	08/23/2025	CELL PHONES AUG	11-21-00-52210 PD TELEPHONE EXPENSE	1,595.42
287305350776	08/23/2025	CELL PHONE-AUG25	11-22-00-52210 FIRE TELEPHONE EXPENSE	673.79
Total AT&T MOBILITY:				2,269.21
AT&T WISCONSIN				
4356856018	09/11/2025	CITY HALL-LINES- .45	11-16-10-52210 CITY HALL TELEPHONE	216.11
4356856018	09/11/2025	POLICE MAIN-LINES- .45	11-21-00-52210 PD TELEPHONE EXPENSE	216.11
4356856018	09/11/2025	COURT MAIN-LINES- .05	11-12-00-52210 MUNICIPAL CT TELEPHONE	24.02
4356856018	09/11/2025	METER-LINES- .05	42-34-50-52210 TELEPHONE EXPENSE	24.01
5447186017	09/11/2025	CITY HALL-PORTS- .45	11-16-10-52210 CITY HALL TELEPHONE	322.06
5447186017	09/11/2025	POLICE MAIN-PORTS- .45	11-21-00-52210 PD TELEPHONE EXPENSE	322.06
5447186017	09/11/2025	COURT MAIN-PORTS .05	11-12-00-52210 MUNICIPAL CT TELEPHONE	35.78
5447186017	09/11/2025	METER-PORTS- .05	42-34-50-52210 TELEPHONE EXPENSE	35.78
Total AT&T WISCONSIN:				1,195.93
AURORA MEDICAL GROUP				
279490	09/07/2025	PHYSICAL EXAMS, BW & CHES	11-22-00-58400 PRE-EMPLOYMENT TESTING	505.00
Total AURORA MEDICAL GROUP:				505.00
BRIAN WALES PIANO TUNER				
09/11/25	09/11/2025	PIANO TUNING 09/11/25	40-55-10-46740 UPPER RIVIERA REVENUE	180.00
Total BRIAN WALES PIANO TUNER:				180.00
CASTANEDA, CLAIRE				
09/06/25	09/10/2025	RIVIERA DEPOSIT REFUND-09/	40-55-10-23530 SECURITY DEPOSITS-UPPER RIV	1,000.00
09/06/25	09/10/2025	DEDUCTION-AFTER 1 AM @ $4	40-55-10-46740 UPPER RIVIERA REVENUE	800.00-
Total CASTANEDA, CLAIRE:				200.00
CHARTER COMMUNICATIONS				
152473401090	09/01/2025	INTERNET SVC SEP 2025	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	100.00
152474001092	09/21/2025	INTERNET SVC OCT 2025	11-22-00-52210 FIRE TELEPHONE EXPENSE	119.99
152474201091	09/14/2025	INTERNET SVC SEPT 2025	47-70-00-57155 TOURISM MUNICIPAL DEVELOPMENT	119.99
152474301091	09/14/2025	INTERNET SVC SEP 2025	11-21-00-52210 PD TELEPHONE EXPENSE	359.99
152474401914	09/14/2025	INTERNET SVC SEP 2025	11-22-00-52210 FIRE TELEPHONE EXPENSE	219.99
Total CHARTER COMMUNICATIONS:				919.96
CITY ELECTRIC SUPPLY-MA				
LKG/106240	06/12/2025	(25) 13WATT TB LED, LIGHT BU	11-22-00-53500 BLDG MAINT SUPPLIES-FIREHOUSE	333.47

Invoice Number	Invoice Date	Description	GL Account and Title		Net Invoice Amount
Total CITY ELECTRIC SUPPLY-MA:					333.47
CITY OF LAKE GENEVA BID					
AUG 2025	09/16/2025	WAL CTY S/A AUG 2025	89-00-00-24700	DUE TO BID DISTRICT	2,454.13
Total CITY OF LAKE GENEVA BID:					2,454.13
CITY OF LAKE GENEVA POLICE DEPT					
PETTYCASH 0	09/16/2025	PETTY CASH-POSTAGE	11-21-00-53120	PD POSTAGE	40.40
Total CITY OF LAKE GENEVA POLICE DEPT:					40.40
DAUGHERTY, SARAH					
09/13/25	09/24/2025	RIVIERA DEPOSIT REFUND 09/1	40-55-10-23530	SECURITY DEPOSITS-UPPER RIV	1,000.00
09/13/25	09/24/2025	PIANO TUNINIG FEE	40-55-10-46740	UPPER RIVIERA REVENUE	180.00-
09/13/25	09/24/2025	VOMIT CLEANUP CHARGE	40-55-10-46740	UPPER RIVIERA REVENUE	250.00-
09/13/25	09/24/2025	2 HOURS SET UP FEE	40-55-10-46740	UPPER RIVIERA REVENUE	100.00-
Total DAUGHERTY, SARAH:					470.00
DE LAGE LANDEN FINANCIAL SERVICES INC					
592031604	09/08/2025	COPIER OCT 2025	11-22-00-53400	OPERATING SUPPLIES	291.81
Total DE LAGE LANDEN FINANCIAL SERVICES INC:					291.81
DETKOWSKI, DENNIS					
09/18/25	09/18/2025	PER DIEM VOLK FIELD TRAININ	11-22-00-51440	FD TRAVEL/MEAL EXPENSES	238.00
Total DETKOWSKI, DENNIS:					238.00
DUNN LUMBER					
212533	06/03/2025	DUSTER,BRUSH, BROOM,	11-22-00-53500	BLDG MAINT SUPPLIES-FIREHOUSE	61.94-
2146288	09/08/2025	AIR TAGS-PD KEYS	11-21-00-52620	PD COMMUNICATION SYS MAINT FEE	20.98
2166300	09/24/2025	MICRO 16" BAR	11-32-13-54300	TREE & BRUSH OPER SUPPLIES	82.98
Total DUNN LUMBER:					42.02
ELAN FINANCIAL SERVICES					
1459-082625	08/26/2025	SLING RENEWAL-BEACH	40-54-10-53100	BEACH OFFICE SUPPLIES	21.84
1459-082625	08/26/2025	SLING RENEWAL-BOAT	40-52-11-53990	LAUNCH RAMP MISCELLANEOUS	4.00
1459-082625	08/26/2025	SLING RENEWAL-RIV	40-55-20-53990	MISCELLANEOUS EXPENSES	12.00
1459-082625	08/26/2025	PARKS DIRECTOR-BUS CARDS	11-52-00-53400	PARKS OPERATING SUPPLIES	30.98
1459-082625	08/26/2025	5 GAL WATER EXCHA	40-54-10-53990	BEACH MISCELLANEOUS	14.56
1459-082625	08/26/2025	TOOLS, CLOG REMOVER, TUB	11-16-10-53500	CITY HALL BLDG MAINT SUPPLIES	60.87
1459-082625	08/26/2025	BEACH PASS TEST	42-34-50-46330	PARKING STALL COLLECTIONS	10.00
1459-082625	08/26/2025	WIX-GOOGLE ADS-RENEWAL	47-70-00-57155	TOURISM MUNICIPAL DEVELOPMENT	300.00
1459-082625	08/26/2025	SLING RENEWAL-PARKING	42-34-50-53100	OFFICE SUPPLIES	24.00
1459-082625	08/26/2025	5 GAL WATER	40-54-10-53990	BEACH MISCELLANEOUS	15.26
1459-082625	08/26/2025	SHOP TOWELS	42-34-50-53100	OFFICE SUPPLIES	26.94
1459-082625	08/26/2025	50 YEARLY EVENTS-PYMT	11-15-10-54500	COMPUTER IT SVC & EQUIPMENT	109.00
1459-082625	08/26/2025	GATORADE,WATER	42-34-50-53400	OPERATING SUPPLIES-ENFORCEMEN	41.21
1459-082625	08/26/2025	POP ICE, BAG OF ICE	42-34-50-53400	OPERATING SUPPLIES-ENFORCEMEN	15.52
1459-082625	08/26/2025	MAYOR-NAME TAGS	11-14-10-53990	MAYOR MISC EXPENSE	140.86
4007-AUG2025	08/26/2025	MICROSOFT OFFICE - REIMBU	99-00-00-52110	GENERAL ADMIN EXPENSES	105.49
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110	GENERAL ADMIN EXPENSES	45.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110	GENERAL ADMIN EXPENSES	270.00

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	76.50
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	15.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	15.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	50.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	25.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	25.00
4007-AUG2025	08/26/2025	CANVA ORDER - REIMBURSEM	99-00-00-52110 GENERAL ADMIN EXPENSES	25.00
4007-AUG2025	08/26/2025	GOOGLE BUSINESS SUITE	99-00-00-52110 GENERAL ADMIN EXPENSES	134.40
4007-AUG2025	08/26/2025	PROGRAM SUPPLIES - REIMBU	99-00-00-54150 LIBRARY PROGRAMS	20.00
4007-AUG2025	08/26/2025	FACEBOOK AD	99-00-00-54155 LIBRARY MARKETING	1.11
4007-AUG2025	08/26/2025	FACEBOOK AD	99-00-00-54155 LIBRARY MARKETING	38.77
4007-AUG2025	08/26/2025	POSTAGE	99-00-00-53120 LIBRARY POSTAGE	9.43
5921-AUG2025	08/26/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	3.42
5921-AUG2025	08/26/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	84.49
5921-AUG2025	08/26/2025	STAFF CONTINUING EDUCATIO	99-00-00-53320 STAFF CONTINUING EDUCATION	200.00
5921-AUG2025	08/26/2025	STAFF CONTINUING EDUCATIO	99-00-00-53320 STAFF CONTINUING EDUCATION	242.56
5921-AUG2025	08/26/2025	CRAFTING SUPPLIES - GRANT	99-00-00-52110 GENERAL ADMIN EXPENSES	53.45
5921-AUG2025	08/26/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	136.84
5921-AUG2025	08/26/2025	PROGRAM SUPPLIES	99-00-00-54150 LIBRARY PROGRAMS	147.40
7498-AUG2025	08/26/2025	CHRG, SMART,MK-111,FEMALE	11-22-00-58110 SPECIALIZED TEAMS EQUIP/SUP	492.22
7498-AUG2025	08/26/2025	FLOWERS-PERNICE FAMILY "B	11-22-00-53990 FIRE MISCELLANEOUS EXP	71.73
7498-AUG2025	08/26/2025	ETSY-PERNICE BABY GIFT BLA	11-22-00-57360 DONATION PURCHASES	56.63
7498-AUG2025	08/26/2025	LOCKER TAGS X4	11-22-00-53500 BLDG MAINT SUPPLIES-FIREHOUSE	126.00
7498-AUG2025	08/26/2025	ENVIROBACK CHARCOAL MAT	11-22-00-53500 BLDG MAINT SUPPLIES-FIREHOUSE	68.91
7498-AUG2025	08/26/2025	HOME DEPOT-SPLASH GAURD	11-22-00-52175 2% FIRE DUES EXPENSES	74.70
7498-AUG2025	08/26/2025	HOME DEPOT-TOOL BOX, HITC	11-22-00-52175 2% FIRE DUES EXPENSES	116.38
7498-AUG2025	08/26/2025	ETSY SALES TAX REFUND	11-22-00-57360 DONATION PURCHASES	5.65-
7498-AUG2025	08/26/2025	HOME DEPOT-SPLASH GAURD	11-22-00-52175 2% FIRE DUES EXPENSES	71.27
7498-AUG2025	08/26/2025	PIGGLY WIGGLY-VENESIAN FE	11-22-00-53990 FIRE MISCELLANEOUS EXP	27.85
7498-AUG2025	08/26/2025	PIGGLY WIGGLY-VENESIAN FE	11-22-00-53990 FIRE MISCELLANEOUS EXP	94.06
7498-AUG2025	08/26/2025	HOME DEPOT-170-GAL PRO GR	11-22-00-52175 2% FIRE DUES EXPENSES	99.00
7498-AUG2025	08/26/2025	GINOS EAST-PIZZA/DINNER FO	11-22-00-52175 2% FIRE DUES EXPENSES	100.23
7498-AUG2025	08/26/2025	CONWAY SHIELDS-6" SHIELDS	50-22-00-58000 FIRE EQUIPMENT PURCHASES	375.87
9805-AUG 202	08/26/2025	MEMBERSHIP	11-52-00-53400 PARKS OPERATING SUPPLIES	150.00
9805-AUG 202	08/26/2025	NRPA MEMBERSHIP DUES	11-52-00-53400 PARKS OPERATING SUPPLIES	115.00
9805-AUG 202	08/26/2025	CPRP EXAM PREPERATION KIT	11-52-00-53400 PARKS OPERATING SUPPLIES	460.00
9805-AUG 202	08/26/2025	CPSI COURSE & EXAM	11-52-00-53400 PARKS OPERATING SUPPLIES	525.00
AUG 2025-247	08/26/2025	REGIONAL NEWS SUB	11-32-10-53400 OPERATING SUPPLIES-STREET DEPT	14.99
AUG 2025-247	08/26/2025	FILTERS ,OIL, NUT, UPPER TUB	11-32-13-54300 TREE & BRUSH OPER SUPPLIES	178.23
AUG 2025-247	08/26/2025	FLOOR MATTS FOR BLAKES TR	11-32-10-53400 OPERATING SUPPLIES-STREET DEPT	199.98
AUG 2025-247	08/26/2025	PRESSURE WASHER REPLACE	11-32-10-53500 BLDG MAINT SUPPLIES-STR DEPT	45.57
AUG 2025-247	08/26/2025	SUMMER KIDS LUNCH IN DRIN	11-32-10-53400 OPERATING SUPPLIES-STREET DEPT	2.80
AUG 2025-247	08/26/2025	INDEX DIVIDERS- ALAN	11-32-10-53990 ST DEPT MISCELLANEOUS EXP	14.28
AUG 2025-247	08/26/2025	ADOBE SUB	11-32-10-53400 OPERATING SUPPLIES-STREET DEPT	21.09
AUG 2025-247	08/26/2025	TOGGLE SWITCH-	11-32-10-52500 ST DEPT EQUIPMENT REPAIRS	6.48
AUG 2025-247	08/26/2025	PRESTOLITE MOTOR KIT	11-32-10-52500 ST DEPT EQUIPMENT REPAIRS	293.19
AUG 2025-247	08/26/2025	BRASS PLUMBING FITTING FO	11-52-00-52410 BLDG MAINT&REPAIR-PARKS	12.50
AUG 2025-247	08/26/2025	BRASS PLUMBING FITTING FO	11-52-00-52410 BLDG MAINT&REPAIR-PARKS	12.50
AUG 2025-247	08/26/2025	TOP HANDLE CHAINSAW	11-32-13-54300 TREE & BRUSH OPER SUPPLIES	34.99
Total ELAN FINANCIAL SERVICES:				6,406.70
FRANK, LINDA				
689993	09/30/2025	TICKET #689993 PAID TWICE IN	42-34-50-46100 PARKING MISC REVENUE	60.00
Total FRANK, LINDA:				60.00

Invoice Number	Invoice Date	Description	GL Account and Title		Net Invoice Amount
GENEVA LAKE ARTS FOUNDATION					
AIP-AUG 2025	09/17/2025	ART IN THE PARK-REIMB 2025	47-70-00-57150	PROMOTIONAL GRANT	20,369.50
Total GENEVA LAKE ARTS FOUNDATION:					20,369.50
GENEVA ONLINE INC					
1175103	09/01/2025	INTERNET-SEPT	11-21-00-52210	PD TELEPHONE EXPENSE	39.00
Total GENEVA ONLINE INC:					39.00
GREAT AMERICA FINANCIAL SERVICES CORP					
39999041	08/28/2025	SHARP COPIER SEPT 2025	11-13-00-53990	CITY ATTORNEY MISC EXPENSES	205.73
Total GREAT AMERICA FINANCIAL SERVICES CORP:					205.73
HANSEN, LUKE					
09/16/25	09/16/2025	SWAT TRAINING MEALS-09/21-0	11-21-00-53310	PD MEALS & LODGING	315.00
Total HANSEN, LUKE:					315.00
HARTLAUB, MATTHEW					
09/18/25	09/18/2025	PER DIEM VOLK FIELD TRAININ	11-22-00-51440	FD TRAVEL/MEAL EXPENSES	102.00
Total HARTLAUB, MATTHEW:					102.00
HENDRY, MARVIN					
09/18/25	09/18/2025	PER DIEM VOLK FIELD TRAININ	11-22-00-51440	FD TRAVEL/MEAL EXPENSES	170.00
Total HENDRY, MARVIN:					170.00
HINZPETER, SEAN					
09/16/25	09/16/2025	SWAT TRAINING MEALS-09/21-0	11-21-00-53310	PD MEALS & LODGING	315.00
Total HINZPETER, SEAN:					315.00
INTERSPIRO INC					
111889	07/02/2025	DIVE EQUIPMENT	11-22-00-58200	STATE MANDATED EQUIP TESTING	1,858.72
Total INTERSPIRO INC:					1,858.72
JOHN PETERS					
09/18/25	09/18/2025	PER DIEM VOLK FIELD TRAININ	11-22-00-51440	FD TRAVEL/MEAL EXPENSES	374.00
Total JOHN PETERS:					374.00
JONES, HEATHER					
NOV 2025	10/01/2025	RIVIERA EVENTS COORDINATO	47-00-00-57212	RIVIERA MARKETING COORDINATOR	5,833.34
Total JONES, HEATHER:					5,833.34
KAMMES INVESTMENTS LLC					
APR2025	09/16/2025	REFUND OVER PYMT-APR 2025	11-00-00-41210	ROOM TAX	1,319.27
Total KAMMES INVESTMENTS LLC:					1,319.27
KORNAK, EMILY					
09262025	09/26/2025	MAY-SEPT PHONE REIM	99-00-00-52110	GENERAL ADMIN EXPENSES	100.00

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
09262025	09/26/2025	MILEAGE REIM MAY-SEPT	99-00-00-52110 GENERAL ADMIN EXPENSES	91.84
Total KORNAK, EMILY:				191.84
KRAJOVIC, MICHAEL W.				
09/30/25	09/30/2025	HILMOOR CONSULTANT-09/30/2	11-62-01-59900 OTHER PROFESSIONAL SERVICES	1,500.00
Total KRAJOVIC, MICHAEL W.:				1,500.00
LAKE GENEVA UTILITY				
AUG 2025	09/16/2025	WAL CTY S/A-AUG 2025-SEWER	89-00-00-24530 DUE TO SEWER FUND	155.35
AUG 2025	09/16/2025	WAL CTY S/A-AUG 2025-WATER	89-00-00-24520 DUE TO WATER FUND	242.36
Total LAKE GENEVA UTILITY:				397.71
MANHATTAN SHORT INC				
09082025	09/08/2025	MANHATTAN SHORT-SEPT2025	99-00-00-54150 LIBRARY PROGRAMS	600.00
Total MANHATTAN SHORT INC:				600.00
MCNEIL, KYLE				
09/16/25	09/16/2025	SWAT TRAINING MEALS-09/23-0	11-21-00-53310 PD MEALS & LODGING	189.00
Total MCNEIL, KYLE:				189.00
PALMIERI, MARINA				
09/20/25	09/24/2025	RIVIERA DEPOSIT REFUND 09/2	40-55-10-23530 SECURITY DEPOSITS-UPPER RIV	1,000.00
09/20/25	09/24/2025	VOMIT CLEANUP FEE	40-55-10-46740 UPPER RIVIERA REVENUE	250.00-
Total PALMIERI, MARINA:				750.00
PHILBRICK, KATHERINE				
09/12/25	09/24/2025	RIVIERA DEPOSIT REFUND 09/1	40-55-10-23530 SECURITY DEPOSITS-UPPER RIV	1,000.00
Total PHILBRICK, KATHERINE:				1,000.00
RACINE COUNTY CLERK OF COURT				
WARRANT-BA	09/25/2025	WARRANT#/24CT298-SHAWNTA	11-12-00-24280 COURT FINES-OTHER	285.00
Total RACINE COUNTY CLERK OF COURT:				285.00
RHYME BUSINESS PRODUCTS				
40075925	09/08/2025	B&Z SHARP COPIER	11-32-10-53400 OPERATING SUPPLIES-STREET DEPT	211.03
Total RHYME BUSINESS PRODUCTS:				211.03
SHIRODA, CORTNEY				
09/17/25	09/17/2025	REIMB REFRESHMENTS FOR F	11-21-00-54100 PD TRAINING EXPENSES	131.24
10/01/25	10/02/2025	MEALS-TRAINING 10/14-10/16/2	11-21-00-53310 PD MEALS & LODGING	57.00
Total SHIRODA, CORTNEY:				188.24
SPRINGHORN, KARL				
09/16/25	09/16/2025	SWAT TRAINING MEALS-09/21-0	11-21-00-53310 PD MEALS & LODGING	189.00
Total SPRINGHORN, KARL:				189.00

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount
US CELLULAR				
0756004646	09/12/2025	HARBORMASTER CELL	40-55-10-52210 TELEPHONE EXPENSE	50.74
0756004646	09/12/2025	ADMINISTRATOR CELL	11-16-10-52210 CITY HALL TELEPHONE	52.23
0756004646	09/12/2025	BUILDING INSPECTOR CELL	11-24-00-52620 TELEPHONE EXPENSE	17.74
0756004646	09/12/2025	BEACH CELL	40-54-10-52210 BEACH TELEPHONE	17.24
0756004646	09/12/2025	RIVIERA CELL-HEATHER	47-70-00-57155 TOURISM MUNICIPAL DEVELOPMENT	32.73
0756004646	09/12/2025	PARKING CELL #1	42-34-50-52210 TELEPHONE EXPENSE	40.97
0756004646	09/12/2025	STREET DIRECTOR (TOM) CEL	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	70.20
0756004646	09/12/2025	STREET FOREMAN (NEIL) CELL	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	52.73
0756004646	09/12/2025	STREET FOREMAN (BRETT) CE	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	17.74
0756004646	09/12/2025	ARBORIST (JON) CELL	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	22.24
0756004646	09/12/2025	PARKING MANAGER CELL	42-34-50-52210 TELEPHONE EXPENSE	17.24
0756004646	09/12/2025	PARKING CELL #2	42-34-50-52210 TELEPHONE EXPENSE	40.85
0756004646	09/12/2025	CITY MAINTENANCE CELL	11-16-10-52210 CITY HALL TELEPHONE	17.74
0756004646	09/12/2025	PARKING SUPERVISOR CELL	42-34-50-52210 TELEPHONE EXPENSE	17.24
0756004646	09/12/2025	CITY CLERK CELL	11-16-10-52210 CITY HALL TELEPHONE	52.73
0756004646	09/12/2025	PARKS SUPERINTENDENT	11-32-10-52210 ST DEPT TELEPHONE EXPENSE	45.73
0756004646	09/12/2025	CEMETERY CELL	48-00-00-52210 CEM TELEPHONE EXP	17.74
Total US CELLULAR:				583.83
VERIZON WIRELESS				
6121869571	08/23/2025	CRADLEPOINT- AUG25	11-22-00-52210 FIRE TELEPHONE EXPENSE	38.01
Total VERIZON WIRELESS:				38.01
WALWORTH COUNTY				
UNCLAIMED F	09/24/2025	UNCLAIMED FUNDS-DEC 31, 02	11-00-00-24200 DUE TO WALWORTH COUNTY	1,182.50
UNCLAIMED F	09/24/2025	UNCLAIMED FUNDS-DEC 31, 02	89-00-00-24300 DUE TO WALWORTH COUNTY	45.94
Total WALWORTH COUNTY:				1,228.44
WE ENERGIES				
5621091310	09/09/2025	UNIT B LIBRARY	99-00-00-52220 LIBRARY UTILITIES	43.25
5623070742	09/10/2025	UNIT A RESTROOMS	11-52-00-52240 PARKS GAS HEAT	10.23
5623737890	09/10/2025	1065 CAREY ST STORAGE BLD	11-22-00-52240 FIREHOUSE GAS HEAT	5.12
5623737890	09/10/2025	1065 CAREY ST STORAGE BLD	11-21-00-52220 POLICE IMPOUND BLDG ELECTRIC	5.11
5623847054	09/10/2025	UNIT A LIBRARY	99-00-00-52220 LIBRARY UTILITIES	10.23
5633307043	09/17/2025	CITY HALL GAS/HEAT	11-16-10-52240 CITY HALL GAS HEAT	548.81
5633307043	09/17/2025	FIREHOUSE GAS/HEAT	11-22-00-52240 FIREHOUSE GAS HEAT	62.05
5633307043	09/17/2025	UPPER RIVIERA GAS/HEAT	40-55-10-52240 UPPER RIVIERA GAS HEAT	71.26
5633307043	09/17/2025	HOST DRIVE WATER TOWER	11-22-00-52240 FIREHOUSE GAS HEAT	14.89
5633307043	09/17/2025	MUSEUM GAS/HEAT	11-51-10-52240 MUSEUM-GAS HEAT	25.50
5633307043	09/17/2025	1055 CAREY ST BUILDING	11-32-10-52240 ST DEPT BLDG GAS HEAT	10.23
5633307043	09/17/2025	1065 CAREY ST BUILDING	11-32-10-52240 ST DEPT BLDG GAS HEAT	28.75
5633307043	09/17/2025	1070 CAREY ST BUILDING	11-32-10-52240 ST DEPT BLDG GAS HEAT	10.23
5633307043	09/17/2025	VETS PARK GAS/HEAT	11-52-01-52240 VETS PARK GAS HEAT	9.90
5633307043	09/17/2025	CEMETERY GAS/HEAT	48-00-00-52240 CEM GAS HEAT EXP	17.35
Total WE ENERGIES:				872.91
Grand Totals:				86,133.94

Invoice Number	Invoice Date	Description	GL Account and Title	Net Invoice Amount

Dated: _____

Mayor: _____

City Council: _____

_____

_____

_____

_____

_____

City Recorder: _____

Report Criteria:
Detail report.
Invoices with totals above $0.00 included.
Paid and unpaid invoices included.
Invoice.Batch = "09192025","09162025PD","09182025","09262025","09302025","10032025"

Harbormaster

Department: Parks Department

FLSA Status: Exempt

Reports to: Parks Director

Salary Grade: G

General Definition of Work

The Harbormaster is responsible for the operation and management of the City of Lake Geneva's lakefront facilities, including the boat launch, piers, buoys, Riviera Beach, and related amenities. This position supervises seasonal staff, enforces waterfront ordinances, administers watercraft leases, and provides customer service to residents and visitors. The Harbormaster also assists the Parks & Recreation Director with departmental functions, long-range planning, and special projects.

This is a full-time, year-round position. Responsibilities shift seasonally, with active waterfront operations in the spring and summer, and administrative, environmental, and support duties in the fall and winter.

Qualification Requirements

To perform this job successfully, an individual must be able to perform each essential function satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Essential Duties and Responsibilities

General Duties

- Manage daily operations of the boat launch, Riviera Beach, piers, buoys, and waterfront facilities.
- Supervise, train, schedule, and evaluate seasonal lakefront staff.
- Ensure compliance with waterfront ordinances, leases, and permits.
- Work with Police and Community Service Officers to issue citations and address violations.
- Monitor waterfront facilities for safety, cleanliness, and maintenance needs.
- Respond to resident and visitor inquiries in a timely and professional manner.
- Process boat, buoy, and kayak leases; maintain accurate waiting lists and application files.
- Collect, reconcile, and deliver waterfront-related fees to the Finance Department.
- Prepare monthly reports for the Piers, Harbors, and Lakefront Committee.
- Conduct annual comparisons of lease and rental rates with surrounding communities and recommend adjustments.
- Monitor waterfront conditions and identify environmental concerns such as erosion, invasive species, and water quality issues.

Strategic and Long-Range Planning

- Coordinate with environmental groups, DNR, and other agencies on lakefront sustainability and protection efforts.
- Provide public information and education on environmental topics such as clean boating practices and water safety.
- Provide administrative and program support for citywide recreation and parks initiatives.

DRAFT

- Assist with planning, permitting, and coordination of special events.
- Contribute to long- and short-range planning, including environmental and recreation-related projects.
- Assist with grant applications related to waterfront, environmental, and parks initiative.

Supervision

- Hire, train and supervise lakefront staff including Riveria employees, boat launch and beach staff.

Budget

- Responsible for budgeting for lakefront operations and assisting in capital planning for lakefront projects and other projects as assigned.

Knowledge, Skills, and Abilities

- Knowledge of waterfront operations and municipal lease administration.
- Understanding of environmental stewardship practices, including invasive species prevention and water quality monitoring.
- Ability to enforce ordinances and collaborate with law enforcement.
- Strong organizational and supervisory skills with experience managing seasonal staff.
- Ability to provide excellent customer service and resolve conflicts effectively.
- Proficiency in Microsoft Office; ability to learn additional software as needed.

Education and Experience

- Bachelor's degree in Recreation Management, Environmental Science, Public Administration, or a related field preferred.
- Experience in waterfront, recreation, or facility management preferred.
- At least two years of supervisory experience.
- Experience with environmental stewardship and municipal operations strongly preferred.

Physical Demands

The work of the Harbormaster is performed both in an office setting and in the field at lakefront facilities, in all weather conditions. While performing the duties of this job, the employee is frequently required to sit or stand for extended periods of time.

- Must be able to lift and move up to 50 pounds.
- Must have hand-eye coordination to operate equipment, tools, and office devices.
- Must be able to communicate effectively in person, on the telephone, and electronically.
- Must be able to work in waterfront environments that include exposure to water, weather, noise, and hazardous conditions requiring appropriate safety precautions.

The physical demands described are representative of those that must be met by an employee to successfully perform the essential function of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential function.

The City of Lake Geneva is an Equal Opportunity Employer.

DRAFT

Communication requesting authorization and direction that certain City-owned parcels of real estate may be utilized by the City of Lake Geneva and/or the State of Wisconsin for the STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20, in and to the following lands in City of Lake Geneva, Walworth County, Wisconsin, described as follows:

Parcel 15 LEGAL DESCRIPTION

A Temporary Limited Easement for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of Lot 2 of CSM 2467, recorded in Volume 12 of Certified Survey Maps, Page 156, located in the Southwest 1/4 of the Northeast 1/4 of Section 36, Town 2 North, Range 17 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Beginning at the Northeast corner of said Lot; thence South 32°25’37” East, 23.52 feet; thence South 57°34’23” West, 10.00 feet; thence North 32°25’37” West, 30.00 feet; thence South 89°29’21” East, 11.92 feet to the point of beginning.

This portion contains **0.0062 ac (268 sq ft)**, more or less.

Parcel 17 LEGAL DESCRIPTION

A Temporary Limited Easement for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of the Southwest 1/4 of the Northeast 1/4 of Section 36, Town 2 North, Range 17 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the center of Section 36; thence South 89°34’32” East, 1318.03 feet along the south line of the Northeast 1/4 of Section 36 to the 1/16 line; thence North 00°14’28” East, 716.35 feet along the 1/16 line; thence North 89°38’34” West, 44.85 feet; thence North 00°21’26” East, 50.83 feet to the point of beginning; thence North 00°44’01” West, 5.00 feet; thence North 89°31’01” West, 25.00 feet; thence South 00°44’01” West, 5.00 feet; thence South 89°31’01” East, 25.00 feet to the point of beginning.

This portion contains **0.0029 ac (125 sq ft)**, more or less.

Parcel 23 LEGAL DESCRIPTION

Dedication for right-of-way/highway purposes (Fee Title) in and to the following tract of land located in the City of Lake Geneva, Walworth County, State of Wisconsin, described as:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1857.41 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning; thence North 80°52'33" East, 234.97 feet to the north right of way line of State Highway 50; thence South 78°23'07" West along said right of way, 236.90 feet; thence North 00°17'59" East, 10.43 feet along west line of the Northwest 1/4 of Section 31 to the point of beginning.

This parcel contains **0.0277 ac (1209 sq ft)**, more or less.

Also, a **Permanent Limited Easement** for drainage facilities, maintenance and construction so long as required for public purpose, including the right to preserve and protect such facilities, pertaining to the following tract of land located in the City of Lake Geneva, Walworth County, State of Wisconsin, described as:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31; thence North 78°23'07" East, 591.86 feet to the point of beginning; thence continuing North 78°23'07" East, 40.00 feet; thence South 11°36'53" East, 40.00 feet; thence South 78°23'07" West, 40.00 feet; thence North 11°36'53" West, 40.00 feet to the point of beginning.

This parcel contains **0.0367 ac (1600 sq ft)**, more or less.

Also, a **Temporary Limited Easement** for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning; thence North 78°23'07" East, 591.86 feet; thence South 11°36'53" East, 40.00 feet to the north right of way line of State Highway 50; thence South 78°23'07" West along said right of way, 363.40 feet; thence South 80°52'33" West, 234.97 feet; thence North 00°17'59" East, 30.45 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning.

Wall is excluded from the above Temporary Easement.

This portion contains **0.5196 ac (22634 sq ft)**, more or less.

Also, a **Temporary Limited Easement** for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate

the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31; thence North 78°23'07" East, 631.86 feet to the point of beginning; thence continuing North 78°23'07" East, 114.69 feet; thence South 11°36'53" East, 15.00 feet; thence North 78°23'07" East, 875.00 feet; thence South 11°36'53" East, 25.00 feet; thence South 78°23'07" West, 989.69 feet; thence North 11°36'53" West, 40.00 feet to the point of beginning.

Wall is excluded from the above Temporary Easement.

This portion contains **0.6075 ac (26463 sq ft)**, more or less.

The above temporary limited easements are to terminate upon the completion of this project or on the day the highway is open to the traveling public, whichever is later.

Any interests or rights not listed above for said parcels but shown as required on said plat are hereby incorporated herein by reference.

Further recommends that certified copies of this resolution be forwarded to the Wisconsin Department of Transportation as part of the documentation related to the aforementioned STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20.

Fiscal Note: Funding for this project will be in Account XXXXX-XXXXX.

Communication requesting authorization and direction that certain City-owned parcels of real estate may be utilized by the City of Lake Geneva and/or the State of Wisconsin for the STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20, in and to the following lands in City of Lake Geneva, Walworth County, Wisconsin, described as follows:

Parcel 15 LEGAL DESCRIPTION

A Temporary Limited Easement for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of Lot 2 of CSM 2467, recorded in Volume 12 of Certified Survey Maps, Page 156, located in the Southwest 1/4 of the Northeast 1/4 of Section 36, Town 2 North, Range 17 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Beginning at the Northeast corner of said Lot; thence South 32°25’37” East, 23.52 feet; thence South 57°34’23” West, 10.00 feet; thence North 32°25’37” West, 30.00 feet; thence South 89°29’21” East, 11.92 feet to the point of beginning.

This portion contains **0.0062 ac (268 sq ft)**, more or less.

The above temporary limited easement is to terminate upon the completion of this project or on the day the highway is open to the traveling public, whichever is later.

Any interests or rights not listed above for said parcel but shown as required on said plat are hereby incorporated herein by reference.

Further recommends that certified copies of this resolution be forwarded to the Wisconsin Department of Transportation as part of the documentation related to the aforementioned STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20.

Fiscal Note: Funding for this project will be in Account XXXXX-XXXXX.

Communication requesting authorization and direction that certain City-owned parcels of real estate may be utilized by the City of Lake Geneva and/or the State of Wisconsin for the STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20, in and to the following lands in City of Lake Geneva, Walworth County, Wisconsin, described as follows:

Parcel 17 LEGAL DESCRIPTION

A Temporary Limited Easement for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of the Southwest 1/4 of the Northeast 1/4 of Section 36, Town 2 North, Range 17 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the center of Section 36; thence South 89°34’32” East, 1318.03 feet along the south line of the Northeast 1/4 of Section 36 to the 1/16 line; thence North 00°14’28” East, 716.35 feet along the 1/16 line; thence North 89°38’34” West, 44.85 feet; thence North 00°21’26” East, 50.83 feet to the point of beginning; thence North 00°44’01” West, 5.00 feet; thence North 89°31’01” West, 25.00 feet; thence South 00°44’01” West, 5.00 feet; thence South 89°31’01” East, 25.00 feet to the point of beginning.

This portion contains **0.0029 ac (125 sq ft)**, more or less.

The above temporary limited easement is to terminate upon the completion of this project or on the day the highway is open to the traveling public, whichever is later.

Any interests or rights not listed above for said parcel but shown as required on said plat are hereby incorporated herein by reference.

Further recommends that certified copies of this resolution be forwarded to the Wisconsin Department of Transportation as part of the documentation related to the aforementioned STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20.

Fiscal Note: Funding for this project will be in Account XXXXX-XXXXX.

Communication requesting authorization and direction that certain City-owned parcels of real estate may be utilized by the City of Lake Geneva and/or the State of Wisconsin for the STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20, in and to the following lands in City of Lake Geneva, Walworth County, Wisconsin, described as follows:

Parcel 23 LEGAL DESCRIPTION

Dedication for right-of-way/highway purposes (Fee Title) in and to the following tract of land located in the City of Lake Geneva, Walworth County, State of Wisconsin, described as:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1857.41 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning; thence North 80°52'33" East, 234.97 feet to the north right of way line of State Highway 50; thence South 78°23'07" West along said right of way, 236.90 feet; thence North 00°17'59" East, 10.43 feet along west line of the Northwest 1/4 of Section 31 to the point of beginning.

This parcel contains **0.0277 ac (1209 sq ft)**, more or less.

Also, a **Permanent Limited Easement** for drainage facilities, maintenance and construction so long as required for public purpose, including the right to preserve and protect such facilities, pertaining to the following tract of land located in the City of Lake Geneva, Walworth County, State of Wisconsin, described as:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31; thence North 78°23'07" East, 591.86 feet to the point of beginning; thence continuing North 78°23'07" East, 40.00 feet; thence South 11°36'53" East, 40.00 feet; thence South 78°23'07" West, 40.00 feet; thence North 11°36'53" West, 40.00 feet to the point of beginning.

This parcel contains **0.0367 ac (1600 sq ft)**, more or less.

Also, a **Temporary Limited Easement** for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:

That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:

Commencing at the Northwest corner of Section 31; thence South 00°17'59" West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning; thence North 78°23'07" East, 591.86 feet; thence South 11°36'53" East, 40.00 feet to the north right of way line of State Highway 50; thence South 78°23'07"

West along said right of way, 363.40 feet; thence South 80°52’33” West, 234.97 feet; thence North 00°17’59” East, 30.45 feet along the west line of the Northwest 1/4 of Section 31 to the point of beginning.
Wall is excluded from the above Temporary Easement.
This portion contains **0.5196 ac (22634 sq ft)**, more or less.

Also, a **Temporary Limited Easement** for the right of slope improvement of sidewalk and pavement construction operations including for such purpose the right to operate the necessary equipment thereon and the right of ingress and egress as long as required for such public purpose, including the right to preserve, protect, remove, or plant thereon any vegetation that the highway authorities may deem necessary or desirable, in and to the following tract of land, in the City of Lake Geneva, Walworth County, State of Wisconsin, described as follows:
That part of the Southwest 1/4 of the Northwest 1/4 of Section 31, Town 2 North, Range 18 East, City of Lake Geneva, Walworth County, Wisconsin, described as:
Commencing at the Northwest corner of Section 31; thence South 00°17’59” West, 1826.96 feet along the west line of the Northwest 1/4 of Section 31; thence North 78°23’07” East, 631.86 feet to the point of beginning; thence continuing North 78°23’07” East, 114.69 feet; thence South 11°36’53” East, 15.00 feet; thence North 78°23’07” East, 875.00 feet; thence South 11°36’53” East, 25.00 feet; thence South 78°23’07” West, 989.69 feet; thence North 11°36’53” West, 40.00 feet to the point of beginning.
Wall is excluded from the above Temporary Easement.
This portion contains **0.6075 ac (26463 sq ft)**, more or less.

The above temporary limited easements are to terminate upon the completion of this project or on the day the highway is open to the traveling public, whichever is later.

Any interests or rights not listed above for said parcel but shown as required on said plat are hereby incorporated herein by reference.

Further recommends that certified copies of this resolution be forwarded to the Wisconsin Department of Transportation as part of the documentation related to the aforementioned STH 50 W Main St (Forest St to Grand Geneva Way) Project ID 3170-09-20.

Fiscal Note: Funding for this project will be in Account XXXXX-XXXXX.