

Library Board Meeting Agenda



May 19, 2025 - 6:00 PM
New Berlin Library
15105 W Library Lane

AGENDA

1. PUBLIC COMMENT SESSION
2. CALL TO ORDER
3. ROLL CALL; DECLARATION OF QUORUM; PUBLIC NOTICE
4. COMMITTEE REPORTS

A. Friends of New Berlin Library, Inc.

5. **CONSENT AGENDA**-----

Items under the Consent Agenda have passed unanimously by the Committee of the Whole. Items not passed by a unanimous vote will be removed from consent agenda and will be considered separately.

A. Approval of minutes

i. Meeting Minutes: Monday, April 21, 2025

B. Next meeting date: Monday, June 16, 2025

C. Approval of Bills and Invoices

6. **END CONSENT AGENDA**-----

7. ADMINISTRATIVE REPORTS

A. President's Report

B. Director's Report

8. OLD BUSINESS

A. Director's Evaluation-Closed Session

9. NEW BUSINESS

A. 2025 Allowable Costs

B. Trustee Essentials: [How Libraries Change Lives](#)

C. 2025-2028 Strategic Plan

D. Waukesha County Library Standards Certification

E. NBPL Employee Handbook

10. ANNOUNCEMENTS

11. ADJOURN

Additional Information

- The agenda packet, including supplemental information related to agenda items, is available online at www.NewBerlinWI.gov. Once finalized by the governing body, approved meeting minutes will also be posted online.
- Agenda items may be taken out of order at the governing body's discretion.
- Members, and possibly a quorum, of other municipal governmental bodies may attend this meeting to gather information. However, no action will be taken by any governmental body other than the one referenced in this notice.
- Accommodations will be provided under the Americans with Disabilities Act (ADA) to meet the needs of individuals with disabilities. If you require assistance or appropriate aids and services, please contact the Office of the City Clerk at (262) 786-8610 with reasonable notice.

Minutes
New Berlin Public Library Board Meeting
April 21, 2025 at 6:00 P.M.
New Berlin Public Library
Marion Onesti Board Room

Call to Order:

The meeting was called to order by President Marek at 6:04 P.M.

Attendance:

Members Present: Ruth Bock, Chuck Garrigues, Dolores Greenawalt, Nathan Jung, Charlotte Kroupa, John Marek, Barb Uhen

Members Excused: Jill Kawala, Patti Orzel

Staff Members Present: Natalie Beacom, Director

Others Present: Kathy Wiemelt, President, Friends of the Library

Friends of the Library (FOL):

President Wiemelt reported on the following news:

1. FOL deposited 10,380 dollars from the spring book sale
2. FOL sent out their annual report for 2024 to its members
3. FOL has introduced a new logo
4. FOL's volunteer brunch is scheduled for June

President Marek commended FOL for their support on behalf of the Board of Trustees

Consent Agenda Items:

The following items were presented on the consent agenda for approval:

- A. Minutes from Monday, March 17, 2025
- B. Next meeting date: Monday, May 19, 2025
- C. Bills and Invoices

Trustee Garrigues moved to approve consent agenda barring information mistakenly added to consent agenda regarding larger city affairs and pending spelling correction. Motion seconded by Trustee Kroupa. The motion was approved 7-0.

Administrative Reports:

President's Report: None

Director's Report: Director Beacom notes that the library will host a performance by a classical guitarist on Friday, May 9th 2025 from 6:30-7:30 pm. Trustee Garrigues asks about library's relationship to the city-wide Cartegraph system. Director Beacom notes the system will allow the library to send custodial and other requests to the city, which the city can then parcel out for greater efficiency. President Marek requests financial overview from Marquette Associates, which

Director Beacom and the Board agreed to schedule for January and perhaps annually thereafter.

OLD BUSINESS: None

NEW BUSINESS:

A. Board forms ad hoc committee to conduct annual Library Director evaluation; committee is comprised of President Marek, Trustee Greenawalt, and Trustee Bock. The committee will proceed by seeking staff input from staff. Trustee Jung will send and compile evaluations from staff and submit the results to the committee for reference in the evaluation process.

B. Board forms ad hoc committee for library board officer nominations; committee is comprised of Trustee Jung and Trustee Greenawalt.

C. Trustee Essentials: Natalie discusses guidelines for public advocacy for libraries

ANNOUNCEMENTS: None

ADJOURNMENT:

Trustee Greenawalt made a motion to adjourn. It was seconded by Trustee Kroupa. The motion passed on a vote of 7-0. The meeting was adjourned at 6:45 P.M.

Respectfully submitted,

Nathan Jung, Vice President

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/4 TO 2025/4										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
22810000								LIBRARY DONATION		
22810000 55100 FOL								PROGRAMS-ADULT		
274046 SALGADO MIGDALED	2025 4/1-12/31	0	2025 4	INV	P	400.00 042325	278698	FOL #2420/ART PROG		
318876 TIMM PAUL M	5/3/25 NB LIB PROG	0	2025 4	INV	P	200.00 042325	278717	FOL#2435/PROG PRESE		
387576 WISCONSIN HISTORICAL	6/10/25NB LIB PROG	0	2025 4	INV	P	75.00 042325	278738	FOL#2435 LIB PROG P		
388408 HAQUE FAREED	5/9/25 NB LIB PROG	0	2025 4	INV	P	492.40 042325	278645	FOL#2436/5/9/25 NB		
						ACCOUNT TOTAL			1,167.40	
						ORG 22810000 TOTAL			1,167.40	
FUND 0200 LIBRARY DONATION FUND						TOTAL:			1,167.40	

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04								
ACCOUNTS FOR:	LIBRARY	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
22810000	48040	DONATIONS	0	0	-8,194.65	.00	8,194.65	100.0%
22810000	54110	SUPPLIES	0	0	159.58	.00	-159.58	100.0%*
22810000	54110	FOL SUPPLIES	0	0	1,848.95	.00	-1,848.95	100.0%*
22810000	54230	FOL BOOKS/PAMPHLE	0	0	281.56	.00	-281.56	100.0%*
22810000	55090	PROGRAMS-JUVENIL	0	0	101.59	.00	-101.59	100.0%*
22810000	55090	FOL PROGRAMS-JUVE	0	0	106.46	.00	-106.46	100.0%*
22810000	55095	FOL PROGRAMS-YOUN	0	0	15.96	.00	-15.96	100.0%*
22810000	55100	FOL PROGRAMS-ADUL	0	0	5,118.30	.00	-5,118.30	100.0%*
TOTAL LIBRARY			0	0	-562.25	.00	562.25	100.0%
TOTAL REVENUES			0	0	-8,194.65	.00	8,194.65	
TOTAL EXPENSES			0	0	7,632.40	.00	-7,632.40	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	0	0	0	-562.25	.00	562.25	100.0%

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04								
ACCOUNTS FOR:	ORIGINAL	TRANFRS/	REVISED				AVAILABLE	PCT
000 UNDESIGNATED	APPROP	ADJSTMTS	BUDGET	YTD	ACTUAL	ENCUMBRANCES	BUDGET	USE/COL
01010400 44111 LIBRARY-COPIES	-8,500	0	-8,500	-2,324.85		.00	-6,175.15	27.4%*
01010400 44112 LIBRARY-OTHER SY	-23,231	0	-23,231	.00		.00	-23,231.00	.0%*
TOTAL UNDESIGNATED	-31,731	0	-31,731	-2,324.85		.00	-29,406.15	7.3%
TOTAL REVENUES	-31,731	0	-31,731	-2,324.85		.00	-29,406.15	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	-31,731	0	-31,731	-2,324.85	.00	-29,406.15	7.3%

** END OF REPORT - Generated by Thu Van Hintz **

YEAR TO DATE THROUGH APRIL 30TH, 2025						
ORG	OBJ	ACCOUNT DESCRIPTION	REVISED BUDGET	YTD EXPENDED	AVAILABLE BUDGET	% USED
15810000	50010	SALARY-FULL TIME	515,954	163,259.12	352,695	31.60
15810000	50020	SALARY-PART TIME	451,464	128,551.35	322,913	28.50
15810000	51010	RETIREMENT	48,777	15,401.69	33,375	31.60
15810000	51020	FICA	75,808	22,064.27	53,744	29.10
15810000	51030	HEALTH INSURANCE	123,338	26,121.95	97,216	21.20
15810000	51060	LONG-TERM DISABILITY	81	0.00	81	0.00
15810000	51065	VISION/DENTAL INSURANCE	1,161	881.37	280	75.90
15810000	51070	LIFE INSURANCE	861	282.36	579	32.80
15810000	53010	ELECTRICITY	70,000	5,724.40	64,276	8.20
15810000	53020	WATER/SEWER	3,876	0.00	3,876	0.00
15810000	53040	TELEPHONE/CELL PHONE	3,756	1,254.80	2,501	33.40
15810000	53050	HEATING FUEL	19,500	2,681.19	16,819	13.70
15810000	54010	R&M BLDGS & GROUNDS	40,000	20,593.85	19,406	51.50
15810000	54030	MAINTENANCE CONTRACT	60,000	2,427.68	57,572	4.00
15810000	54060	MARKETING	1,000	0.00	1,000	0.00
15810000	54080	LEASES EQUIPMENT	48,000	3,298.48	44,702	6.90
15810000	54110	SUPPLIES	27,000	9,050.82	17,949	33.50
15810000	54170	POSTAGE	900	200.00	700	22.20
15810000	54180	HOUSEKEEPING SUPPLY	0	459.43	-459	100.00
15810000	54230	LIBRARY MATERIALS	220,700	104,493.24	116,207	47.30
15810000	54330	TRAINING EXPENSES	500	0.00	500	0.00
15810000	54521	TECHNOLOGY/SOFTWARE	38,000	38,259.13	-259	100.70
15810000	55090	PROGRAMS-JUVENILE	1,200	529.86	670	44.20
15810000	55095	PROGRAMS-YOUNG ADULT	1,800	197.58	1,602	11.00
15810000	55100	PROGRAMS-ADULT	1,200	664.45	536	55.40
		Grand Total	1,754,876	546,397.02	1,208,479	31.10

YEAR TO DATE THROUGH APRIL 30TH, 2025

ORG	OBJ	ACCOUNT DESCRIPTION	REVISED BU YTD EXPENDED		AVAILABLE B % USED	
15810000	50010	SALARY-FULL TIME	515,954	163,259.12	352,695	31.60
15810000	50020	SALARY-PART TIME	451,464	128,551.35	322,913	28.50
15810000	51010	RETIREMENT	48,777	15,401.69	33,375	31.60
15810000	51020	FICA	75,808	22,064.27	53,744	29.10
15810000	51030	HEALTH INSURANCE	123,338	26,121.95	97,216	21.20
15810000	51060	LONG-TERM DISABILITY	81	0.00	81	0.00
15810000	51065	VISION/DENTAL INSURANCE	1,161	881.37	280	75.90
15810000	51070	LIFE INSURANCE	861	282.36	579	32.80
15810000	53010	ELECTRICITY	70,000	5,724.40	64,276	8.20
15810000	53020	WATER/SEWER	3,876	0.00	3,876	0.00
15810000	53040	TELEPHONE/CELL PHONE	3,756	1,254.80	2,501	33.40
15810000	53050	HEATING FUEL	19,500	2,681.19	16,819	13.70
15810000	54010	R&M BLDGS & GROUNDS	40,000	20,593.85	19,406	51.50
15810000	54030	MAINTENANCE CONTRACT	60,000	2,427.68	57,572	4.00
15810000	54060	MARKETING	1,000	0.00	1,000	0.00
15810000	54080	LEASES EQUIPMENT	48,000	3,298.48	44,702	6.90
15810000	54110	SUPPLIES	27,000	9,050.82	17,949	33.50
15810000	54170	POSTAGE	900	200.00	700	22.20
15810000	54180	HOUSEKEEPING SUPPLY	0	459.43	-459	100.00
15810000	54230	LIBRARY MATERIALS	220,700	104,493.24	116,207	47.30
15810000	54330	TRAINING EXPENSES	500	0.00	500	0.00
15810000	54521	TECHNOLOGY/SOFTWARE	38,000	38,259.13	-259	100.70
15810000	55090	PROGRAMS-JUVENILE	1,200	529.86	670	44.20
15810000	55095	PROGRAMS-YOUNG ADULT	1,800	197.58	1,602	11.00
15810000	55100	PROGRAMS-ADULT	1,200	664.45	536	55.40
		Grand Total	1,754,876	546,397.02	1,208,479	31.10

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/4 TO 2025/4	ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION
15810000		LIBRARY							
15810000	53040			TELEPHONE/CELL PHONE					
	302074	AT&T	262785498004	4/4/25	0	2025 4 INV P	313.75	042325	278601 PHONES-LIB 4/4/25
				ACCOUNT TOTAL			313.75		
15810000	54010			R&M BLDGS & GROUNDS					
	003228	BATZNER PEST CONTR	76145814		0	2025 4 INV P	131.89	042325	278607 PESTCNTRL-LIB 4/8/2
	004049	FRISCH, MICHAEL J &	4698		0	2025 4 INV P	1,000.00	042325	278633 2ND FL SOFFITS PAIN
	387851	SIEMENS INDUSTRY INC	5331877758		0	2025 4 INV P	1,300.00	042325	278705 FIRE SERV AGREEMNT-
				ACCOUNT TOTAL			2,431.89		
15810000	54030			MAINTENANCE CONTRACT					
	014113	K-12 TECHNOLOGY GROU	96120		0	2025 4 INV P	551.24	042325	278549 CROWDSTRIKE DEFEND-
				ACCOUNT TOTAL			551.24		
15810000	54080			LEASES EQUIPMENT					
	362301	GREAT AMERICA FINANC	38922412		0	2025 4 INV P	466.57	042325	278644 COPIER LEASE/USAGE-
				ACCOUNT TOTAL			466.57		
15810000	54170			POSTAGE					
	348554	PURCHASE POWER	4/10/25POSTAGE		0	2025 4 INV P	100.00	042325	278689 8000900011110198/PO
				ACCOUNT TOTAL			100.00		
15810000	54230			LIBRARY MATERIALS					
	001613	GALE CENGAGE LEARNIN	87096219		0	2025 4 INV P	27.00	042325	278636 VARIOUS TITLES-LIB
	005972	WISCONSIN COUNTIES A	2025 SUBSCRIP RNEW		0	2025 4 INV P	20.00	042325	278734 SUBSCRIP RENEW-LIB
	006199	BAKER & TAYLOR BOOKS	2038953685		0	2025 4 INV P	908.81	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038956774		0	2025 4 INV P	1,011.54	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038967286		0	2025 4 INV P	233.08	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038967310		0	2025 4 INV P	106.56	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038971347		0	2025 4 INV P	275.78	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038975331		0	2025 4 INV P	113.27	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038975743		0	2025 4 INV P	227.46	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038984576		0	2025 4 INV P	215.30	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	2038986377		0	2025 4 INV P	376.74	042325	278605 VARIOUS TITLES-LIB
	006199	BAKER & TAYLOR BOOKS	LS25030091		0	2025 4 INV P	3,796.20	042325	278605 BOOK LEASING SERV-L
							7,264.74		
	224529	BLACKSTONE PUBLISHIN	2193700		0	2025 4 INV P	7.95	042325	278609 VARIOUS TITLES-LIB
	224537	EBSCO	1757706		0	2025 4 INV P	8,901.09	042325	278621 VARIOUS TITLES-LIB

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/4 TO 2025/4										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
321672 HOOPLA	506969966	0	2025 4	INV	P	1,684.72	042325	278652	DIGITAL MEDIA-LIB	3
361291 MIDWEST TAPE	506962550	0	2025 4	INV	P	72.97	042325	278670	VARIOUS TITLES-LIB	
361291 MIDWEST TAPE	507001187	0	2025 4	INV	P	98.21	042325	278670	VARIOUS TITLES-LIB	
						171.18				
						ACCOUNT TOTAL				18,076.68
15810000 55100						PROGRAMS-ADULT				
375985 GILLIE CAMERON	5/21/25 NBLIB PROG	0	2025 4	INV	P	225.00	042325	278640	5/21/25PROG	PRESENT
						ACCOUNT TOTAL				225.00
						ORG 15810000 TOTAL				22,165.13
FUND 0010 GENERAL FUND						TOTAL:				22,165.13

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04									
ACCOUNTS FOR:	LIBRARY		ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
15810000	50010	SALARY-FULL TIME	515,954	0	515,954	163,259.12	.00	352,694.88	31.6%
15810000	50020	SALARY-PART TIME	451,464	0	451,464	128,551.35	.00	322,912.65	28.5%
15810000	51010	RETIREMENT	48,777	0	48,777	15,401.69	.00	33,375.31	31.6%
15810000	51020	FICA	75,808	0	75,808	22,064.27	.00	53,743.73	29.1%
15810000	51030	HEALTH INSURANCE	123,338	0	123,338	26,121.95	.00	97,216.05	21.2%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	1,161	0	1,161	881.37	.00	279.63	75.9%
15810000	51070	LIFE INSURANCE	861	0	861	282.36	.00	578.64	32.8%
15810000	53010	ELECTRICITY	70,000	0	70,000	5,724.40	.00	64,275.60	8.2%
15810000	53020	WATER/SEWER	3,876	0	3,876	.00	.00	3,876.00	.0%
15810000	53040	TELEPHONE/CELL P	3,756	0	3,756	1,254.80	.00	2,501.20	33.4%
15810000	53050	HEATING FUEL	19,500	0	19,500	2,681.19	.00	16,818.81	13.7%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	20,593.85	.00	19,406.15	51.5%
15810000	54030	MAINTENANCE CONT	60,000	0	60,000	2,427.68	.00	57,572.32	4.0%
15810000	54060	MARKETING	1,000	0	1,000	.00	.00	1,000.00	.0%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	3,298.48	.00	44,701.52	6.9%
15810000	54110	SUPPLIES	27,000	0	27,000	9,050.82	.00	17,949.18	33.5%
15810000	54170	POSTAGE	900	0	900	200.00	.00	700.00	22.2%
15810000	54180	HOUSEKEEPING SUP	0	0	0	459.43	.00	-459.43	100.0%
15810000	54230	LIBRARY MATERIAL	220,700	0	220,700	104,493.24	.00	116,206.76	47.3%
15810000	54330	TRAINING EXPENSE	500	0	500	.00	.00	500.00	.0%
15810000	54521	TECHNOLOGY/SOFTW	38,000	0	38,000	38,259.13	.00	-259.13	100.7%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	529.86	.00	670.14	44.2%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	197.58	.00	1,602.42	11.0%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	664.45	.00	535.55	55.4%
TOTAL LIBRARY			1,754,876	0	1,754,876	546,397.02	.00	1,208,478.98	31.1%
TOTAL EXPENSES			1,754,876	0	1,754,876	546,397.02	.00	1,208,478.98	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 04

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	1,754,876	0	1,754,876	546,397.02	.00	1,208,478.98	31.1%

** END OF REPORT - Generated by Thu Van Hintz **

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
15810000										LIBRARY
15810000 54010			R&M BLDGS & GROUNDS							
021746 GRAINGER	9486868475	0	2025 5	INV	P	386.42 051425		278858 AIRFILTERS(24)-LIB		
			ACCOUNT TOTAL			386.42				
15810000 54030			MAINTENANCE CONTRACT							
010578 LIBRARICA LLC	204152-110R	0	2025 5	INV	P	521.25 051425		278890 SUPPORT/UPDATES REN		
014113 K-12 TECHNOLOGY GROU	96218	0	2025 5	INV	P	551.24 051425		278876 SIMPLIFY IT -LIB 5/		
			ACCOUNT TOTAL			1,072.49				
15810000 54080			LEASES EQUIPMENT							
295906 PITNEY BOWES	3320670019	0	2025 5	INV	P	77.28 051425		278923 POSTAGE METER LEASE		
362301 GREAT AMERICA FINANC	39024033	0	2025 5	INV	P	465.87 051425		278753 COPIER LEASE/USAGE		
362301 GREAT AMERICA FINANC	39138424	0	2025 5	INV	P	539.18 051425		278859 COPIER LEASE/USAGE-		
						1,005.05				
			ACCOUNT TOTAL			1,082.33				
15810000 54180			HOUSEKEEPING SUPPLY							
026400 ITU ABSORB TECH	8521335	0	2025 5	INV	P	91.93 051425		278870 MATS-LIB 4/21/25		
			ACCOUNT TOTAL			91.93				
15810000 54230			LIBRARY MATERIALS							
001613 GALE CENGAGE LEARNIN	999100350148	0	2025 5	INV	P	30.74 051425		278852 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2038995338	0	2025 5	INV	P	226.21 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2038997263	0	2025 5	INV	P	459.06 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2038997264	0	2025 5	INV	P	333.08 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039000649	0	2025 5	INV	P	790.27 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039006860	0	2025 5	INV	P	393.92 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039021266	0	2025 5	INV	P	33.23 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039023897	0	2025 5	INV	P	205.72 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039025137	0	2025 5	INV	P	364.30 051425		278806 VARIOUS TITLES-LIB		
006199 BAKER & TAYLOR BOOKS	2039027246	0	2025 5	INV	P	313.13 051425		278806 VARIOUS TITLES-LIB		
						3,118.92				
020919 FLUTTERBEE EDUCATION	INV112060	0	2025 5	INV	P	736.39 051425		278848 VARIOUS TITLES-LIB		
260487 LERNER PUBLISHING GR	1527021	0	2025 5	INV	P	1,093.49 051425		278888 VARIOUS TITLES-LIB		
294772 CHILDS WORLD	NA163009	0	2025 5	INV	P	1,153.50 051425		278823 VARIOUS TITLES-LIB		
321672 HOOPLA	507111635	0	2025 5	INV	P	1,750.47 051425		278867 DIGITAL MEDIA-LIB 4		
350982 T-MOBILE	970673785 APR2025	0	2025 5	INV	P	611.25 051425		278771 INTERNET HOTSPOTS-L		

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5											
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION			
361291 MIDWEST TAPE	507034112	0	2025 5	INV	P	75.72 051425	278905	VARIOUS TITLES-LIB			
361291 MIDWEST TAPE	507063857	0	2025 5	INV	P	134.95 051425	278905	VARIOUS TITLES-LIB			
361291 MIDWEST TAPE	507097868	0	2025 5	INV	P	282.63 051425	278905	VARIOUS TITLES-LIB			
						493.30					
400408 CAPSTONE PRESS INC	382575	0	2025 5	INV	P	1,146.47 051425	278818	VARIOUS TITLES-LIB			
						ACCOUNT TOTAL				10,134.53	
15810000 55100						PROGRAMS-ADULT					
349119 WONGTAM STEPHANIE	6/3/25 NBLIB PROG	0	2025 5	INV	P	450.00 051425	278986	MAHJONG GAME NITE-L			
						ACCOUNT TOTAL				450.00	
						ORG 15810000 TOTAL				13,217.70	
FUND 0010 GENERAL FUND						TOTAL:				13,217.70	

** END OF REPORT - Generated by Thu Van Hintz **

YEAR-TO-DATE BUDGET REPORT

FOR 2025 05									
ACCOUNTS FOR:	LIBRARY		ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
15810000	50010	SALARY-FULL TIME	515,954	0	515,954	204,260.23	.00	311,693.77	39.6%
15810000	50020	SALARY-PART TIME	451,464	0	451,464	162,621.43	.00	288,842.57	36.0%
15810000	51010	RETIREMENT	48,777	0	48,777	19,523.04	.00	29,253.96	40.0%
15810000	51020	FICA	75,808	0	75,808	27,737.16	.00	48,070.84	36.6%
15810000	51030	HEALTH INSURANCE	123,338	0	123,338	33,456.79	.00	89,881.21	27.1%
15810000	51060	LONG-TERM DISABI	81	0	81	.00	.00	81.00	.0%
15810000	51065	VISION/DENTAL IN	1,161	0	1,161	1,133.19	.00	27.81	97.6%
15810000	51070	LIFE INSURANCE	861	0	861	363.30	.00	497.70	42.2%
15810000	53010	ELECTRICITY	70,000	0	70,000	11,386.72	.00	58,613.28	16.3%
15810000	53020	WATER/SEWER	3,876	0	3,876	955.00	.00	2,921.00	24.6%
15810000	53040	TELEPHONE/CELL P	3,756	0	3,756	1,254.80	.00	2,501.20	33.4%
15810000	53050	HEATING FUEL	19,500	0	19,500	5,065.63	.00	14,434.37	26.0%
15810000	54010	R&M BLDGS & GROU	40,000	0	40,000	20,980.27	.00	19,019.73	52.5%
15810000	54030	MAINTENANCE CONT	60,000	0	60,000	3,500.17	.00	56,499.83	5.8%
15810000	54060	MARKETING	1,000	0	1,000	.00	.00	1,000.00	.0%
15810000	54080	LEASES EQUIPMENT	48,000	0	48,000	4,380.81	.00	43,619.19	9.1%
15810000	54110	SUPPLIES	27,000	0	27,000	9,050.82	.00	17,949.18	33.5%
15810000	54170	POSTAGE	900	0	900	200.00	.00	700.00	22.2%
15810000	54180	HOUSEKEEPING SUP	0	0	0	551.36	.00	-551.36	100.0%
15810000	54230	LIBRARY MATERIAL	220,700	0	220,700	114,627.77	.00	106,072.23	51.9%
15810000	54330	TRAINING EXPENSE	500	0	500	.00	.00	500.00	.0%
15810000	54521	TECHNOLOGY/SOFTW	38,000	0	38,000	38,259.13	.00	-259.13	100.7%
15810000	55090	PROGRAMS-JUVENIL	1,200	0	1,200	529.86	.00	670.14	44.2%
15810000	55095	PROGRAMS-YOUNG A	1,800	0	1,800	197.58	.00	1,602.42	11.0%
15810000	55100	PROGRAMS-ADULT	1,200	0	1,200	1,114.45	.00	85.55	92.9%
TOTAL LIBRARY			1,754,876	0	1,754,876	661,149.51	.00	1,093,726.49	37.7%
TOTAL EXPENSES			1,754,876	0	1,754,876	661,149.51	.00	1,093,726.49	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 05								
	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED	
GRAND TOTAL	1,754,876	0	1,754,876	661,149.51	.00	1,093,726.49	37.7%	
** END OF REPORT - Generated by Thu Van Hintz **								

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5										
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION		
22810000								LIBRARY DONATION		
22810000 55090 FOL								PROGRAMS-JUVENILE		
016176 BIEDERMAN SETH	6/17/25	BIG BALLOON	0	2025	5	INV P	550.00	051425	278810	FOL#2507/BIG BALLOO
							ACCOUNT TOTAL			550.00
22810000 55095 FOL								PROGRAMS-YOUNG ADULT		
014235 DIETRICH, JOSEPH A &	2025	LIB SCHOLARSHIP	0	2025	5	INV P	500.00	051425	278830	FOL#2433/SCHOLARSHI
018945 MCRAE ELISSA J	2025	LIB SCHOLARSHIP	0	2025	5	INV P	500.00	051425	278899	FOL#2433/SCHOLARSHI
236209 KAVANAGH ROSE	2025	LIB SCHOLARSHIP	0	2025	5	INV P	500.00	051425	278878	FOL#2433/SCHOLARSHI
249114 KRUEGER PAUL	2025	LIB SCHOLARSHIP	0	2025	5	INV P	500.00	051425	278882	FOL#2433/SCHOLARSHI
							ACCOUNT TOTAL			2,000.00
22810000 55100 FOL								PROGRAMS-ADULT		
363758 KUNATH CHRISTIAN K &	2025	APR-MAY PROG	0	2025	5	INV P	1,400.00	051425	278883	FOL#2408/LIB PROG S
							ACCOUNT TOTAL			1,400.00
							ORG 22810000 TOTAL			3,950.00
FUND 0200 LIBRARY DONATION FUND						TOTAL:				3,950.00

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YEAR-TO-DATE BUDGET REPORT

FOR 2025 05								
ACCOUNTS FOR:	LIBRARY	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
22810000	48040	DONATIONS	0	0	-13,201.65	.00	13,201.65	100.0%
22810000	54110	SUPPLIES	0	0	159.58	.00	-159.58	100.0%*
22810000	54110	FOL SUPPLIES	0	0	1,848.95	.00	-1,848.95	100.0%*
22810000	54230	FOL BOOKS/PAMPHLE	0	0	281.56	.00	-281.56	100.0%*
22810000	55090	PROGRAMS-JUVENIL	0	0	101.59	.00	-101.59	100.0%*
22810000	55090	FOL PROGRAMS-JUVE	0	0	656.46	.00	-656.46	100.0%*
22810000	55095	FOL PROGRAMS-YOUN	0	0	2,015.96	.00	-2,015.96	100.0%*
22810000	55100	FOL PROGRAMS-ADUL	0	0	6,518.30	.00	-6,518.30	100.0%*
TOTAL LIBRARY			0	0	-1,619.25	.00	1,619.25	100.0%
		TOTAL REVENUES	0	0	-13,201.65	.00	13,201.65	
		TOTAL EXPENSES	0	0	11,582.40	.00	-11,582.40	

YEAR-TO-DATE BUDGET REPORT

FOR 2025 05

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
GRAND TOTAL	0	0	0	-1,619.25	.00	1,619.25	100.0%

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INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5		ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION
15810000			LIBRARY							
15810000	54110						SUPPLIES			
011840	US BANK	3/14/25	WALMART-LIB	0	2025	5	INV P	27.72	050825E	10129 WALMART/PROG SUPPLI
011840	US BANK	3/18/25	AMZN-LIB	0	2025	5	INV P	17.99	050825E	10129 AMZN/LABEL TAPE-LIB
011840	US BANK	3/18/25	AMZN4-LIB	0	2025	5	INV P	19.96	050825E	10129 AMZN/PERMANENT MARK
011840	US BANK	3/18/25	AMZN5-LIB	0	2025	5	INV P	29.97	050825E	10129 AMZN/SHARPIE MARKER
011840	US BANK	3/20/25	AMZN3-LIB	0	2025	5	INV P	27.94	050825E	10129 AMZN/WALL CLOCK-LIB
011840	US BANK	3/23/25	ADOBE-LIB	0	2025	5	INV P	19.99	050825E	10129 ADOBE/LICENSE -LIB
011840	US BANK	3/30/25	AMZN-LIB	0	2025	5	CRM P	-27.98	050825E	10129 AMZN/RET PURCH CRDI
011840	US BANK	4/1/25	AMZN-LIB	0	2025	5	INV P	7.64	050825E	10129 AMZN/MEETING NOTEBO
011840	US BANK	4/10/25	AMZN1-LIB	0	2025	5	INV P	40.98	050825E	10129 AMZN/VARIOUS PROG S
011840	US BANK	4/11/25	AMZN2-LIB	0	2025	5	INV P	16.99	050825E	10129 AMZN/CUBE STORAGE B
011840	US BANK	4/2/25	AMZN1-LIB	0	2025	5	INV P	57.23	050825E	10129 AMZN/DONATION VOTIN
011840	US BANK	4/4/25	ROSATI-LIB	0	2025	5	INV P	177.89	050825E	10129 ROSATI/LUNCH-LIB 4/
011840	US BANK	4/8/25	AMAZN2-LIB	0	2025	5	INV P	49.99	050825E	10129 AMZN/COFFEE URN-LIB
011840	US BANK	4/8/25	AMZN1-LIB	0	2025	5	INV P	200.00	050825E	10129 AMZN/KITCHEN TRASH
011840	US BANK	4/9/25	AMZN-LIB	0	2025	5	INV P	6.99	050825E	10129 AMZN/PLASTIC ID BAD
011840	US BANK	4/9/25	AMZN4-LIB	0	2025	5	INV P	13.69	050825E	10129 AMZN/GARDEN TOOL/DA
								686.99		
ACCOUNT TOTAL								686.99		
15810000	54230						LIBRARY MATERIALS			
011840	US BANK	3/15/25	AMZN-LIB	0	2025	5	CRM P	-7.69	050825E	10129 RET PURCH CRDIT-LIB
011840	US BANK	3/18/25	TARGET1-LIB	0	2025	5	INV P	59.99	050825E	10129 TARGET/NINTENDO GAM
011840	US BANK	3/18/25	TARGET2-LIB	0	2025	5	INV P	69.99	050825E	10129 TARGET/PLAYSTATION
011840	US BANK	3/18/25	TARGET3-LIB	0	2025	5	INV P	69.99	050825E	10129 TARGET/XBOX GAME-LI
011840	US BANK	3/20/25	AMZN-LIB	0	2025	5	INV P	38.74	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	3/20/25	AMZN2-LIB	0	2025	5	INV P	25.32	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	3/20/25	BOARDGAME-LIB	0	2025	5	INV P	356.00	050825E	10129 BOARD GAME/VARIOUS
011840	US BANK	3/21/25	HARLEY MUSEUM	0	2025	5	INV P	500.00	050825E	10129 HARLEY DAVIDSON/ANN
011840	US BANK	3/22/25	AMZN2-LIB	0	2025	5	INV P	16.86	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	3/24/25	ZOO-LIB	0	2025	5	INV P	1,000.00	050825E	10129 MILW ZOO/MEMBERSHIP
011840	US BANK	3/28/25	AMZN-LIB	0	2025	5	INV P	48.99	050825E	10129 AMZN/BIKE STORAGE R
011840	US BANK	3/29/25	AMZN-LIB	0	2025	5	INV P	4.99	050825E	10129 AMZN/VALVE CAPS-LIB
011840	US BANK	3/31/25	SCHLITZ-LIB	0	2025	5	INV P	200.00	050825E	10129 SCHLITZ AUDUBON/MEM
011840	US BANK	4/10/25	AMZN2-LIB	0	2025	5	INV P	6.27	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	4/2/25	AMZN5-LIB	0	2025	5	INV P	10.49	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	4/4/25	WALMART-LIB	0	2025	5	INV P	40.63	050825E	10129 WALMART/PROG SUPPLI
011840	US BANK	4/8/25	AMZN-LIB	0	2025	5	INV P	28.95	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	4/9/25	AMZN1-LIB	0	2025	5	INV P	50.19	050825E	10129 AMZN/VARIOUS TITLES
011840	US BANK	4/9/25	AMZN3-LIB	0	2025	5	INV P	182.47	050825E	10129 AMZN/VARIOUS TITLES
								2,702.18		
ACCOUNT TOTAL								2,702.18		
15810000	55095						PROGRAMS-YOUNG ADULT			
011840	US BANK	3/17/25	AMZN1-LIB	0	2025	5	INV P	68.57	050825E	10129 AMZN/TEEN PROG SUPP
011840	US BANK	3/22/25	AMZN1-LIB	0	2025	5	INV P	19.12	050825E	10129 AMZN/TEEN PROG SUPP
011840	US BANK	3/24/25	AMZN-LIB	0	2025	5	INV P	21.97	050825E	10129 AMZN/TEEN PROG SUPP

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5									
ACCOUNT/VENDOR	INVOICE	PO	YEAR/PR	TYP	S	PAYABLES	CHECK	DESCRIPTION	
011840 US BANK	3/25/25AMZN-LIB	0	2025 5	INV	P	56.85	050825E	10129 AMZN/TEEN PROG SUPP	
						166.51			
						ACCOUNT TOTAL			166.51
15810000 55100									
011840 US BANK	4/8/25TARGET2-LIB	0	2025 5	INV	P	79.52	050825E	10129 TARGET/ADLT PROG SU	
						ACCOUNT TOTAL			79.52
						ORG 15810000 TOTAL			3,635.20
FUND 0010 GENERAL FUND						TOTAL:			3,635.20

** END OF REPORT - Generated by Thu Van Hintz **

INVOICE LIST BY GL ACCOUNT

YEAR/PERIOD: 2025/5 TO 2025/5												
ACCOUNT/VENDOR		INVOICE	PO	YEAR/PR	TYP	S		PAYABLES	CHECK	DESCRIPTION		
22810000										LIBRARY DONATION		
22810000	54110 FOL									SUPPLIES		
011840	US BANK	3/16/25	0	2025	5	INV P		17.84	050825E	10129	FOL#2429/SPOTIFY AP	
011840	US BANK	3/17/25	0	2025	5	INV P		13.49	050825E	10129	FOL#2430/PROG SUPPL	
								31.33				
										ACCOUNT TOTAL		31.33
22810000	55090 FOL									PROGRAMS-JUVENILE		
011840	US BANK	4/1/25	0	2025	5	INV P		14.99	050825E	10129	FOL#2507/AMZN/MOVIE	
011840	US BANK	4/10/25	0	2025	5	INV P		16.58	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/11/25	0	2025	5	INV P		6.78	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/2/25	0	2025	5	INV P		19.16	050825E	10129	FOL#2507/AMZN/PROG	
011840	US BANK	4/2/25	0	2025	5	INV P		78.34	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/2/25	0	2025	5	INV P		46.02	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/2/25	0	2025	5	INV P		26.14	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/2/25	0	2025	5	INV P		7.59	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/2/25	0	2025	5	INV P		30.98	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/3/25	0	2025	5	INV P		35.99	050825E	10129	FOL#2507/AMZN/JUV P	
011840	US BANK	4/5/25	0	2025	5	INV P		35.99	050825E	10129	FOL#2507/AMZN/JUV P	
								318.56				
										ACCOUNT TOTAL		318.56
22810000	55100 FOL									PROGRAMS-ADULT		
011840	US BANK	3/26/25	0	2025	5	INV P		65.58	050825E	10129	FOL#2504TARGET/EAST	
011840	US BANK	4/2/25	0	2025	5	INV P		35.09	050825E	10129	FOL#2424/WALMART/AD	
011840	US BANK	4/5/25	0	2025	5	INV P		36.59	050825E	10129	FOL#2424/WALMART/AD	
011840	US BANK	4/8/25	0	2025	5	INV P		87.38	050825E	10129	FOL#2339/TARGET/ADL	
								224.64				
										ACCOUNT TOTAL		224.64
										ORG 22810000 TOTAL		574.53
										FUND 0200 LIBRARY DONATION FUND		TOTAL: 574.53

** END OF REPORT - Generated by Thu Van Hintz **



Director's Report – April and May 2025

Library Visitors: 20,007 (Up 2% from last month and a 1% increase from April 2024)

Library Circulation: 30,959 (4% increase from April 2024)

MakerStudio Visits: 1,263 (Mar: 1675, Feb: 969, Jan: 971)

Waukesha State Bank: We've begun planning a new partnership with Waukesha State Bank to support financial literacy programming at the library. We're excited about the opportunity to collaborate on a variety of future projects that will help empower our community with essential financial knowledge and skills.

Gift Bricks: With the arrival of spring, we were excited to reconnect with our gift brick donors in April and show them their custom-engraved keepsake bricks. We're pleased to offer donors the opportunity to choose the placement of their special pavers—and even assist in installing them in the library's patio area. It's a meaningful way to honor their contributions and create a lasting legacy.

Celebrating 104 years: Library staff were delighted to join fellow City of New Berlin employees in celebrating two remarkable 104th birthdays at New Berlin's Castle Senior Living facility. We enjoyed sharing stories, memories, cake, and presented gifts to the birthday honorees—it was a heartwarming occasion.



CVMIC Library Roundtable: Library Supervisors and Lead Librarians participated in a statewide roundtable discussion hosted by the Cities and Villages Mutual Insurance Company (CVMIC) and moderated by HR Advisor, Melissa Bohse. The event featured breakout sessions on key topics impacting libraries, including: library funding; serving immigrant and refugee communities; First Amendment audits and intellectual freedom; recent EEOC and DOJ guidance on DEI-related discrimination; and CVMIC's Sexual Abuse & Molestation (SAM) Awareness and Prevention Policy for mandated reporters. We connected with librarians from across the region and left with valuable insights and fresh ideas to bring back to our own library system.

Lakefly Writer's Conference: In May, I participated as a panelist at the Oshkosh Public Library's Lakefly Conference, where I spoke with local authors about partnership opportunities through public libraries. Many self-published authors are eager to see their work represented in library collections, so I joined three other library directors from across the state to share practical tips and ideas for building connections and navigating the process.

City of New Berlin Safety and Wellness: Library staff participated in the first annual Step Up Challenge, a friendly competition designed to encourage movement and wellness by tracking daily steps. While library work tends to be more stationary, staff embraced the challenge and collectively logged over 200,000 steps! One stepper even won a surprise prize—an extra half day off of work to redeem in 2025!

Submitted by: Natalie Beacom, Library Director

Allowable Costs Worksheet for Waukesha County Libraries - in Bridges Library System

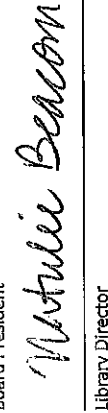
Instructions: Fill out the following financial information as they pertain to prior year actuals and the current year budget. For prior year actual information, please verify that all applicable information matches the reference fields certified in the annual report. For current year adopted budget information, please reflect the numbers adopted by your municipal entity, effective January 1.

Library Name: <u>New Berlin</u>		2024 Actuals (Per Annual Report)	2025 Municipal Adopted Budget	Library Notes or Comments
Description	Annual Report Reference			
Revenues				
Local Municipal Library Operating Revenue	Section V, 1 (for 2024) and Section V, 9 (for 2025)	\$1,757,642	\$1,754,876	
Home County Operating Revenue	Section V, 2(a)	\$20,516	\$19,490	
Other County Payments for Library Services	Section V, 2(b)	\$4,074	\$3,741	
State Funds (e.g. Innovation & Hoopla Grants)	Section V, 3	\$11,766	\$11,766	
Federal Funds	Section V, 4	\$747	\$0	
Contract Income	Section V, 5	\$0	\$0	
Funds Carried Forward for Operations	Section V, 6	\$0	\$0	
All Other Operating Income	Section V, 7	\$85,780	\$43,449	
Indirect Cost Funding (if applicable and if not already counted in Municipal Operating Revenue)	N/A - Field should match Indirect Cost field in Expenditures listed below			
Total Revenues		\$1,880,525	\$1,833,322	
Expenditures				
Operating Expenditures	Section VI, 6	\$1,822,781	\$1,775,112	
Indirect Costs (if applicable and if not already counted in another field)	N/A - Field should match Indirect Cost Funding in Revenues listed above			
Total Operating Expenditures		\$1,822,781	\$1,775,112	
Library Capital and Debt	Section VII (1 & 2)		\$20,542	
Total Expenditures		\$1,822,781	\$1,795,654	

The information listed above is a correct statement of the Library's spending for 2024 actuals and 2025 budget. Please provide any additional comments in the box below.


Board President

4/26/25
Date


Library Director

4.16.25
Date

STRATEGIC PLAN

VISION The New Berlin Public Library is a vital community destination open to everyone.

MISSION Provide a welcoming space for community connections with access to materials and services that enhance education, entertainment, culture, creativity, and curiosity.

The New Berlin Public Library's mission and vision statements provide a framework for the Library Director and staff as we make decisions for the Library's future. Together, as we define a strategic direction for the next two years, we are inspired to continue with our work through the lens of broadened access to the Library and have identified strategic priorities which enhance Library services, resources, community connections and spaces.

-The New Berlin Public Library Strategic Planning Committee

STRATEGIC PRIORITIES

ENHANCED SERVICES

We will continue to develop services and programs that broaden the community's experience and perspective.

ENHANCED COMMUNITY CONNECTIONS

We will seek an active network of local partnerships to support common goals and achieve greater impact within the New Berlin community and promote the library as a destination within the City Center.

ENHANCED SPACE

We will evaluate spaces for enhancements that encourage collaboration, foster connections, develop creativity, and support the free exchange of ideas.

ENHANCED RESOURCES

We will review and curate resources that are inclusive and allow all patrons to be informed, connected, and inspired.



With the support of the New Berlin Public Library Board of Trustees, the New Berlin Public Library Director and Staff look forward to the next two years with strategic focus on the following goals and tasks:

A. ENHANCED SERVICES

Achievement through the following tasks:

- 1) **Develop marketing plans and invest in programming to reach target audiences.**
- 2) **Establish opportunities for community gathering and discourse.**
- 3) **Enhance MakerStudio to incorporate new technologies which prove relevant for all ages.**

B. ENHANCED RESOURCES

Achievement through the following tasks:

- 1) **Improve collection organization to encourage discovery and relevance of library's core collections.**
- 2) **Ensure databases and digital media are available to users and easy to navigate.**
- 3) **Assess our materials to ensure strong, accessible, relevant, and diverse collections.**

C. ENHANCED COMMUNITY CONNECTIONS

Achievement through the following tasks:

- 1) **Expand the library's presence at City-wide events, local activities and Chamber of Commerce meetings.**
- 2) **Outline library offerings, collections and services available to partnering organizations.**
- 3) **Take steps to ensure that the library retains current patrons and invites back infrequent users.**

D. ENHANCED SPACES

Achievement through the following tasks:

- 1) **Development of dynamic, collaborative spaces such as interactive reading areas, group study zones, and an early literacy learning environment that encourages pretend play and social interaction.**
- 2) **Utilize outdoor garden, green space and City Center for Library engagement.**
- 3) **Continue to consider exterior optimization for WiFi connectivity and facility initiatives for solar power and green operation.**

Community Assessment:

Regular assessment of residents, patrons, Library and City Staff, and local community stakeholders will occur throughout the year to measure the Library's impact and value to the community.

Strategic Goal and Task Updates:

The Monthly Director's Report, for the two-year duration of this Strategic Plan, will identify updates on the progress towards the Library's Strategic Priorities.

Approved by the Library Board 4/17/2022

2023-2025 STRATEGIC REVIEW

Thanks to the continued support of the New Berlin Public Library Board of Trustees, the Library Director and staff were able to focus on key strategic goals and tasks. Below are some of the highlights from 2023-2025:

A. ENHANCED SERVICES

- 1) Develop marketing plans and invest in programming to reach target audiences.**
 - Strategic marketing efforts were streamlined to enhance communication with target audiences, primarily through the design and deployment of LibraryMarket's website and calendar tools.
 - Staff Influence team increased social media efforts to promote library resources, services, and programs to target audiences.
- 2) Establish opportunities for community gathering and discourse.**
 - With 2,542 programs, reaching 106,504 patrons, library staff averaged more than 100 programs each month, highlighting their ongoing commitment to community engagement.
- 3) Enhance MakerStudio to incorporate new technologies which prove relevant for all ages.**
 - By organizing storage space, creating supply displays, adding media resources, establishing open hours, and introducing targeted Maker programs for specific audiences, staff have been able to explore new features and technologies to enhance the space.

B. ENHANCED RESOURCES

- 1) Improve collection organization to encourage discovery and relevance of library's core collections.**
 - Regular weeding, shifting, and repositioning of materials help ensure the collection remains current and aligned with circulation trends and ease of access. The Library's circulation and librarian teams have elevated displays with creative designs that draw patrons to the collections. Social media marketing – through posts and reels – have informed the community about available resources. Reading programs for all ages, along with curated displays, further engage patrons.
- 2) Ensure databases and digital media are available to users and easy to navigate.**
 - To provide online offerings and connect with diverse interests, the Library added ComicsPlus and ValueLine databases to the collection, catering to fans of graphic novels and those seeking financial investment resources. Tech Talks and Book-A-Librarian sessions allow patrons to learn about using digital media and equipment. Wonderbooks and Tonies were additions to the youth collection, providing more digital media opportunities for kids to explore.
- 3) Assess our materials to ensure strong, accessible, relevant, and diverse collections.**
 - Library staff collaborated with vendors to assess collection goals and adjust standing orders. Efforts to diversify traditional collections have led to increased availability of technology items such as HotSpots, as well as non-traditional materials including vinyl records, video games & puzzles, Library of Things (costumes) and Experience Passes. Active management of the digital collections within Hoopla and OverDrive provided "Lucky Day" collections for reduced hold times and ensured timely access to popular new fiction titles.

C. ENHANCED COMMUNITY CONNECTIONS

- 1) Expand the library's presence at City-wide events, local activities and Chamber of Commerce meetings.**
 - The Library is represented on City committees (Safety, Wellness, Employee Recognition, Community Relations) and Commissions (Tourism, Safety Saturday) to partner in City and Community discussions and decisions.
 - The Library is active with the City's Tourism Commission and has been the recipient of Enjoy New Berlin grant funds since 2023.
 - The Library acts as the Safety Saturday-Touch-A-Truck Event Coordinator and participates in City celebrations (Boo Bash, Winterfest) and various community events (Discover NB).
 - The Library is present at new business openings (Brunch Berry) and creates opportunities for library card promotion at local businesses (ITC/AbsorbTech).
 - The Library is now included in the City's membership for the Chamber of Commerce and has collaborated with Chamber's leadership on Library events (KinderMarket, Concerts)
 - The Library engaged with senior centers and care facilities with Home Delivery Services and programming. Specific highlights are our partnership with member libraries to offer Memory Cafes and the addition of senior transport to Capri Communities to extend Library access to collections and programs to seniors.
 - The Library coordinated a local Library Card Rewards program to support readership and provide discounts at local businesses.
 - The Library collaborated with the Bridges Library System and School District of New Berlin to participate in the Kids' Choice Awards, a reading challenge created to promote reading to 4th, 5th and 6th grade students.
 - Partner with Holy Apostles School to display student art at the library for Youth Art Month.
 - Community Helper Storytime was held in 2023 - partnered with NB Fire, Public Works, and Police.

2) **Outline library offerings, collections and services available to partnering organizations.**

- The Library initiated collective training and professional development opportunities for City and Bridges employees, including Mental Wellness presentations, NAMI training, and facilitated Dementia-Friendly Community training in collaboration with the ADRC. As a result, the City is now recognized as Dementia-Friendly, proudly displaying official signage to demonstrate a commitment to serving individuals with this need. The Library uses the meeting spaces for a variety of private and public programs and meetings (Blood Drives, Polling/ Voter registration, public information meetings). Additionally, in cases of emergency hazards, the Library acts as a power, cooling and heating safe haven to residents. Library staff regularly collaborate to help plan Bridges Library Systems events (Virtual scavenger hunt initiatives).

3) **Take steps to ensure that the library retains current patrons and invites back infrequent users.**

- The Library has used opportunities such as elections, non-library meetings and social functions to share materials and promotional items, aiming to engage visitors who may be non-users. In partnership with the City Clerk's Office we took over the sale and distribution of City Burning Permits, so are able to see potential new users with each permit purchase. Library meeting space, now available for social functions, also allowed us to expand our reach to potential library users. Using our Library Aware software, a new welcome email protocol has been established to greet new cardholders, while LibraryCalendar registration is used to invite patrons to events and programs that align with their interests. We partnered with the Miss Wisconsin Scholarship Organization for a READ campaign to promote reading among the contestant platforms. Collections continue to grow to reach new patron segments with vinyl records, experience passes, puzzles and games. The NBPL is the only Milwaukee-area venue for screenings of the Manhattan Short Film Festival!

D. ENHANCED SPACES

1) **Development of dynamic, collaborative spaces such as interactive reading areas, group study zones, and an early literacy learning environment that encourages pretend play and social interaction.**

- Additional seating and study tables have been placed throughout the Library to encourage studying, gathering, reading, and to provide designated areas for light snacking. The Youth Services Department now features an Early Literacy Learning Space, supporting developmental growth through play and exploration. Aesthetic updates – including fresh paint, tile, carpeting, an entry mat with Library logo and our logo in vinyl wall art – have refreshed the Library's overall environment, making it more inviting and vibrant for visitors. **Media updates include, adding monitors throughout the building, new sound systems and microphones in meeting rooms, and grant-funded Library Loop Assistive Listening System in the Community Room. The Library overhauled all staff and public computer equipment and servers, along with upgrading software operating systems. We added a grant-funded Microfilm machine that will digitize materials, and all Wifi servers and WAP equipment were replaced.

2) **Utilize outdoor garden, green space and City Center for Library engagement.**

- Seasonal story times and special events – such as the Library's "Summer Celebration", "Sunset Symphony", Family Dog Photo Day, Flea Markets, and Oktoberfest – have helped bring library engagement to the City Center and surrounding green space. The Library's Community Garden has also been a source of enjoyment and connection, with activities like sowing seeds and sharing the harvest with patrons, and composting to contribute to a sense of community and sustainability. We hope visitors stay and enjoy the front courtyard and patio on the Library's accessible blue picnic tables.

3) **Continue to consider exterior optimization for WiFi connectivity and facility initiatives for solar power and green operation.**

- An assessment was conducted to evaluate the possibility of extending WiFi connectivity to the exterior of the Library. After reviewing challenges related to space requirements, optimizing the network's internet connections, and usage considerations, it was determined that the existing internal WiFi coverage currently provides sufficient reach for outdoor uses. The Library has begun discussions with the Department of Public Works facility teams on grant opportunities for solar panels at the Library as a power source. Over the upcoming year, we will assess if roof or ground units will be more beneficial as a power grid for the Library. The Library began the shift to compostable supplies (KinderMarket program, Library supplies).

2025-2028
Make
Connections

STRATEGIC PLAN

VISION The New Berlin Public Library is a vital community destination open to everyone.

MISSION Provide a welcoming space for community connections with access to materials and services that enhance education, entertainment, culture, creativity, and curiosity.

Guided by the mission and vision of the **New Berlin Public Library**, we have defined a strategic course with focus on expanding access. This commitment drives our strategic priorities, which aim to enrich library services, broaden resources, strengthen community engagement, and thoughtfully enhance our physical spaces.

-The New Berlin Public Library Strategic Planning Committee

STRATEGIC PRIORITIES

ENHANCED SERVICES

We will continue to develop services and programs that broaden the community's experience and perspective.

ENHANCED COMMUNITY CONNECTIONS

We will seek an active network of local partnerships to support common goals and achieve greater impact within the New Berlin community,

ENHANCED SPACE

We will evaluate spaces for enhancements that encourage collaboration, foster connections, develop creativity, and support the free exchange of ideas.

ENHANCED RESOURCES

We will review and curate resources that are inclusive and allow all patrons to be informed, connected, and inspired.

With the support of the New Berlin Public Library Board of Trustees, the Library Director, Staff and Volunteers look forward to the next three years with strategic focus on the following goals:

A. ENHANCED SERVICES

Achievement through the following tasks:

- 1) Ensure public access to a broad spectrum of ideas by curating diverse collections, hosting programs, and protecting intellectual freedom.
- 2) Incorporate accessibility tools by integrating emerging & adaptive technologies, multilingual resources and sensory-friendly initiatives at the Library.
- 3) Modernize infrastructure to improve operational efficiency, enhance user experience, and ensure connectivity throughout library spaces.

B. ENHANCED RESOURCES

Achievement through the following tasks:

- 1) Align staffing resources to expand community outreach and create off-site library learning opportunities.
- 2) Assess audience learning needs to ensure collections and materials are meaningful, engaging, and aligned with future skills and opportunities.
- 3) Expand MakerStudio offerings to support diverse forms of creative exploration, bridging traditional arts and crafts with instruction for technology-driven tools and techniques.

C. ENHANCED COMMUNITY CONNECTIONS

Achievement through the following tasks:

- 1) Increase library membership, attendance and circulation with programs and outreach to the community.
- 2) Define and implement strategic resource practices to strengthen long-term relationships with donors and fundraising organizations.
- 3) Partner with citizens, public, private, non-profit and community groups to form a collective space that creates meaning and memory.

D. ENHANCED SPACES

Achievement through the following tasks:

- 1) Reimagine Library's 2nd level floor plan to improve functionality, accessibility, safety, and the patron experience.
- 2) Integrate indoor and outdoor spaces with features that encourage learning, collaboration, and engagement.
- 3) Implement environmentally sustainable strategies for the long-term facility and grounds conservation.

Strategic Performance and Assessment:

Through regular reviews to measure progress toward key strategic goals, library staff ensure we remain aligned with our mission and vision. During the 2025–2028 Strategic Cycle, performance will be evaluated using metrics for community engagement, program participation, and resource usage. These indicators will provide insight into the effectiveness of our initiatives and inform continuous improvement efforts.

Calculation of *Minimum to Exempt* Standards

The data used in the calculation of each of the Waukesha County numeric *Minimum to Exempt* Standards is included below.

Material Expenditures per Capita

- Amount entered in section VI. Library Operating Expenditures, 3e (Library Collection Expenditures) of 2024 library annual report
- 2024 Database charges
- 2024 Overdrive Digital Buying Pool charges (paid to WiLS)
- 2024 Overdrive Advantage charges
- Total expenditures in the above categories are divided by the community's 2023 municipal population

Number of Hours Open per Week

- Average hours open per week during the school year (38 weeks), as reported in 2024 annual report

Budgeted Staff in FTE

- Amount entered in section X. Staff, 2c (Total Library Staff FTE) of 2024 library annual report

Collection Size

- Amounts entered in section II. Library Collection of 2024 library annual report
 - 1. Books in Print
 - 3. Physical Audio Materials
 - 4. Physical Video Material
 - 5. Other Physical Materials

Public Computers/Internet Access Devices

- Amount entered in section III. Library Services, 8b. (Number of Public Use Computers with Internet Access) of 2024 library annual report

Wireless Access

- For many years all libraries have reported wireless access is available. Unless a library reports otherwise, the assumption will be that this will continue from year to year.



741 N. Grand Ave., #210
Waukesha, WI 53186

P 262.896.8080
W bridgeslibrarysystem.org

To: New Berlin Public Library Board of Trustees
From: Karol Kennedy, Bridges Library System Director
Re: Waukesha County Library Standards Certification
Date: May 1, 2025

Wisconsin Statute 43.64(2) allows Waukesha County municipalities that tax their residents for libraries the opportunity to exempt their residents from the county library levy if two criteria are met:

- 1) The municipal tax rate for library services is equal to or greater than the rate of the county library tax, and
- 2) The library meets or exceeds the Waukesha County adopted library standards.

Exemption from the county library tax, therefore, includes two distinct actions. The municipality action required is a certification of its library tax rate. That process begins when I send out a communication to the municipality after the state releases its official Equalized Assessed Values in mid-August.

The library action requires the library board to review the information in this letter and certify the library's compliance with the various standards by completing the form beginning on page 2 of this document and returning it to the Bridges office by August 31, 2025.

The Waukesha County Board approved the updated county library standards in April 2022. All 16 library boards in the county have since endorsed these standards. More information is available here: <https://bridgeslibrarysystem.org/waukesha-county-planning-committee-2016-act-150/>. There are numeric *Minimums to Exempt* as well as *Quality Assurance Items* in the standards. This letter includes your library's specific standards-related requirements.

Please complete the documentation on pages 3-4 and then complete the *Library Board Certification of Eligibility for Exemption from County Library Tax* on page 5. Please **scan and send all pages (with signatures on page 5) to the Bridges office via email by August 31**. This form constitutes your library's certification for compliance with the library standards portion required for exemption from the Waukesha County library tax levy.

Thank you for providing outstanding library services to the citizens of Waukesha County!

Step 1. Review your Library’s Library Service Effort Ratio (LSER) Calculation

There is a provision in the Waukesha County Plan that allows a library to qualify for the exemption without meeting the *Minimums to Exempt*. If a library can demonstrate its ability to provide for most of the needs of its own resident by reaching its targeted Library Service Effort Ratio (LSER), it is allowed to exempt from the county library tax without meeting the numeric *Minimums to Exempt*.

The LSER is calculated as follows:

- Lending by your library to your own residents: 303,194
- PLUS lending to other library community’s residents: 33,270
- DIVIDED by total circulation by your residents at all county libraries: 351,691

Your library’s LSER is shown in Table 1 below.

Table 1.

New Berlin’s Library Service Effort Ratio (LSER)		Eligible for Exemption Based on LSER?
Target	Actual	Pass?
95%	95.67%	YES

If your LSER ratio is higher than your listed target rate, you will see a “Yes” in Table 1 above and may skip to step 3 on this form. Please note, even if there is a “Yes” listed above, you are encouraged to complete step 2 for the purposes of assessment. However, if your LSER is higher than your required target, step 2 is not required for the purposes of meeting the minimum for the standards portion of the county library tax exemption. If there is a “No” in Table 1 for your library, you must complete step 2. All libraries must complete step 3.

Step 2: Compare your Library’s previous year’s data to your Library’s *Minimums to Exempt*

Please review the data below gathered from your library’s 2024 state annual report and indicate whether your library will meet its minimum requirements in 2025.

Please circle “Yes” or “No” in the last column in Table 2. **(Completing this table is required if LSER = “NO” in step 1.)**

Table 2.

Library	New Berlin		2023 Municipal Population	40,135
Category	Minimum to Exempt	Library Actuals from 2024 annual report	Met Minimum during 2024?	Will Meet Minimum in 2025? (Circle one)
Materials Expenditures/Capita	\$5.50/capita	\$6.31/capita	Yes	Yes No
Number Hours Open/Week	60	67	Yes	Yes No
Budgeted Staff in FTE	17.94	19.90	Yes	Yes No
Collection Size	127,000	145,518	Yes	Yes No
Public Computers/Internet Access Devices	21	22	Yes	Yes No
Wireless Internet Access	Yes	Yes	Yes	Yes No

Step 3. Review and Report on Quality Assurance Standards for New Berlin Public Library

Review each item and circle “Yes” or “No” in Table 3 below. **(Completing this Table is required regardless of LSER ratio.)**

Table 3.

Quality Assurance Standards	Library Assurance for 2025 (circle one)	
Library board member orientations are provided	Yes	No
Library website includes key board/staff contact & meeting information	Yes	No
Library board conducts director performance evaluation	Yes	No
Library budgets for professional development	Yes	No
Library has active strategic plan	Yes	No
Library has a current circulation policy	Yes	No
Library has a current collection management policy	Yes	No
Library has a current computer/internet policy	Yes	No
Library has a current meeting room use policy (if meeting room available)	Yes	No
Library has a current public behavior (rules of conduct) policy	Yes	No
Library has a current personnel policy	Yes	No

Policies are considered current if they have been adopted or reviewed within the last five years.

Please attach narrative for any items for which the library circles “No” and describe steps planned to address the area(s) of non-compliance. Note: For each item in tables 2 and 3, libraries are able to select “No” one time during the annual certification process for the five-year planning period.

If your library has circled “No” for an item in a previous year in tables 2 or 3, circling “No” a second time for that same item may result in the loss of ability for the municipality to exempt its residents from the county library tax.

Library Board Certification of Eligibility for Exemption from County Library Tax

I certify that the library board's responses related to the *Minimums to Exempt and Quality Assurance Standards* were approved by the library board and reflect the library's plan of service for 2025.

Name of Library	New Berlin Public Library
Date Form Completed:	
Library Board President Name:	
Library Board President Signature:	
Library Director's Signature:	

This form (pages 1-5) must be completed, signed, and submitted to the Bridges Library System no later than **August 31, 2025**.



CITY OF NEW BERLIN

EMPLOYEE HANDBOOK

Effective May 1, 2025

Original February 2015

Table of Contents

INTRODUCTION	1
Core Value Expectations.....	2
Employees Covered by these Policies.....	3
City Government Organization.....	3
Public Relations.....	3
<u>PART I: GENERAL EMPLOYMENT LAWS AND PROTECTIONS</u>	3
A. Equal Employment Opportunity.....	3
B. Americans with Disabilities (ADA).....	4
C. Anti-Harassment, Discrimination, Retaliation & Bullying Policy.....	4
D. Workplace Violence Hazard Identification.....	4
E. Weapons Policy.....	5
F. Workers Compensation.....	5
G. Workplace Safety.....	6
<u>PART II: PROFESSIONAL RESPONSIBILITIES AND EXPECTATIONS</u>	6
A. Work Schedule.....	6
B. Attendance.....	6
C. Severe Weather/Declared Emergency.....	7
D. Conflict of Interest – Code of Ethics.....	8
E. Charges/Convictions for Active Employees.....	8
F. Discipline.....	9
G. Grievance Procedure.....	9
H. Dress code.....	12
I. Drug, Alcohol and Tobacco Free Workplace.....	13
J. Email, City and Employee Communications, Technology.....	13
K. Employee Code of Conduct Policy.....	14
L. False Reports.....	15
M. Nepotism.....	15
<u>PART III: EMPLOYMENT MATTERS</u>	15
A. Employee Definitions.....	15
B. City Property.....	16
C. Evaluations.....	16
D. Career Development.....	16
E. Conferences, Trainings and Seminars.....	16
F. Identification Badge.....	18
G. Job Descriptions.....	18
H. Personnel Records.....	18
I. CDL Requirements.....	18
J. Promotion.....	18
K. Acting/Interim Appointment.....	18
L. Transfer.....	19
M. Reductions in Staff.....	19
N. Rehire Philosophy.....	19
O. Resignations/Retirements.....	20
P. Records.....	20

<u>PART V: PAY AND OTHER COMPENSATION</u>	21
A. Fair Labors Standards Act.....	21
B. Direct Deposit.....	24
C. Deductions and Garnishments.....	24
<u>PART VI: LEAVES AND ABSENCES</u>	24
A. Bereavement/Funeral Leave.....	25
B. Family & Medical Leave.....	25
C. Holiday Pay.....	26
D. Job Abandonment.....	25
E. Jury Duty Leave.....	26
F. Military Leave.....	27
G. Religious Observances.....	27
H. Voting Leave.....	27
I. Flex Time.....	27
J. Sick Leave.....	27
K. Official Record of Leave.....	28
L. Unpaid Leaves.....	28
M. Unexcused Absences.....	29
N. Sick Leave Donation.....	29
<u>PART VII: BENEFITS</u>	31
A. Health Insurance.....	31
B. Dental.....	32
C. Voluntary Vision.....	32
D. Employee Assistance Program.....	32
E. Flexible Spending Accounts.....	32
F. Life Insurance.....	32
G. Long-Term Disability.....	32
H. Retirement Savings Plan.....	33
I. Wisconsin Retirement System.....	33
J. Retirement Benefits.....	33
K. Vacation.....	34
L. Work from Home.....	36
<u>PART VIII: GENERAL PERSONNEL GUIDELINES</u>	36
A. General Conduct.....	36
B. Hazard Communication Program.....	36
C. Use of City Vehicles.....	36
D. Use of City Equipment Including Information Technology.....	37
APPENDICES	
A. Appendix A – NBPFA Benefits.....	38
B. Appendix B – NBPPA Benefits.....	40
<u>Handbook Receipt</u>	42

INTRODUCTION

This handbook provides basic information and guidelines regarding employee policies and practices, benefits, expectations and responsibilities. This edition of the handbook supersedes all previous editions. In many instances, the handbook directs employees to individual policy statements rather than attempting to summarize those policies. Employees are hereby informed that, henceforth, all City of New Berlin policies are displayed on our intranet and employees are responsible for reviewing and familiarizing themselves with the policies. Employees will no longer automatically receive paper copies of policies. Upon request, employees may receive a paper copy of any City policy. The City of New Berlin may add to these guidelines and/or policies, revoke, or modify them from time to time at their sole discretion and without prior notice to employees. The City will keep these guidelines and/or policies current, but there may be times when a policy will change before the handbook can be revised, published and communicated. Employees will be advised when a policy has changed.

Employees are expected to be familiar with this handbook and all policies which relate to their job and to comply with the provisions of this handbook and City policies. In addition, each department may have its own set of work rules, which employees are expected to know and comply with. This handbook does not represent every conceivable type of employment situation; it is a summary of established guidelines, policies and benefits. None of the statements, policies, procedures, rules, or regulations contained herein constitute a guarantee of employment, a guarantee of any other right or benefit, or a contract of employment, express or implied. All of the City's employees, except sworn members of the Police Department, and Fire Department, covered by a collective bargaining agreement are employed "at will" and employment is not for any definite period. No employee of the City has any authority to enter into any contract for employment, express or implied, for any specified period of time, or to make any agreement contrary to the at-will status of City employees with the exception of sworn members of the Police Department and of the Fire Department. Termination of at will employment may occur at any time, with or without notice, and with or without cause, at the option of the City or the employee.

Unless otherwise prohibited by law, final interpretation and implementation of the policies contained in this handbook is vested solely with the City of New Berlin. Notwithstanding any provision herein, the City may and will make employment-related decisions on a case-by-case basis based on the facts of the particular situation.

CORE VALUE EXPECTATIONS

The following set of core values are expected of all City of New Berlin employees at each level and performance is measured against these core values along with any others that a Department Head deems a requirement for their department and of their employees.

1. **Honesty/Integrity**: Behaves in an honest, fair, and ethical manner. Shows consistency in words and actions. Models high standards of ethics. Some key behaviors to review:
 - Respects confidentiality
 - Admits mistakes in spite of the potential for negative consequences
 - Consistently tells the truth
 - Challenges others who are not acting with integrity or telling the truth
 - Takes stands based on the City's Code of Conduct & Code of Ethics despite personal or professional risk
 - Leads by example
2. **Service to Public/Other Employees**: Commits to satisfying external and internal relationships with the public and co-workers. Inspires and fosters team commitment, spirit, pride and trust. Facilitates cooperation while delivering a high-quality service. Some key behaviors to review:
 - Quickly and effectively solves problems
 - Let's the public and co-workers know they are willing to work with them
 - Presents a cheerful, positive manner
 - Provides assistance, information and support to others
 - Treats other courteously and respectfully
3. **Dependability/Reliability**: Employee is reliable and dependable in performing job-related tasks, finishing assigned projects, meeting deadlines and appointments. Some key behaviors to review:
 - Comes to work on time as scheduled
 - Responds to work assignments by being cooperative and available
 - Works without Supervision
 - Relied upon by others as a source for valid information
 - Follows through and meets commitments
4. **Professionalism/ Etiquette**: Employee uses sound judgment to meet or exceed workplace guidelines, standards and expectations while treating coworkers, the public, vendors and employer with respect and courtesy in a way that creates a pleasant work environment for everyone. Some key behaviors to review:
 - Taking responsibility for own actions
 - Follows workplace policies
 - Takes responsibility to understand and adapt to workplace culture
 - Abides by and respects the standards of practice recognized in their field
 - Creates positive relationships with co-workers
 - Communicates effectively
 - Dresses appropriately

EMPLOYEES COVERED BY THESE POLICIES

This Handbook applies to all City employees, except those under the control of the Police & Fire Commission where separate policies have been adopted that supersede portions of this Handbook. **For City employees that are covered by an existing Labor Agreement or Contract, the City Code, Agreement or Contract shall apply in the event of a difference between these policies and specific provisions of the Agreement or Code.** Interpretation of this Handbook rests with management.

CITY GOVERNMENT ORGANIZATION

The City of New Berlin operates under the Mayor-Council form of government, pursuant to Chapter 62 of the Wisconsin Statutes. It has an elected Mayor and a seven-member Common Council. The Mayor is elected at large for a four-year term and the Common Council members are elected by district for staggered three-year terms. The Mayor is the chief executive officer of the City and is responsible for carrying out directives and policies of the Mayor's office and Council, subject to statutory limits that may apply. The Common Council is the policy formulating body for the City. The Council President presides over meetings of the Common Council during the Mayor's absence.

PUBLIC RELATIONS

Media inquiries received by City staff should be referred immediately to the City Clerk, as well as the applicable Department Head or the second-in-command of that department, in the absence of the Department Head, or the Police or Fire Public Information Officer. Unless the inquiry is regarding routine, already disseminated public information employees should politely decline making comments, obtain the caller's name, news organization, and contact information. Employees are permitted to release routine information, involving a response of a factual, incidental or inconsequential nature, for example, the time and location of a meeting or special event; the process for applying for a business license or permit; the number of people employed by the City or other information already within the public domain. Refer to the City's Media Relations Policy for further guidelines.

PART I. GENERAL EMPLOYMENT LAWS AND PROTECTIONS

A. EQUAL EMPLOYMENT OPPORTUNITY

The City of New Berlin is an Equal Opportunity Employer. The City has incorporated a mindset of fair and objective employment practices throughout all of our human resources systems and activities.

The City does not discriminate against applicants and employees on the basis of age, race, color, creed, religion, disability, handicap, pregnancy, marital or parental status, sex, sexual orientation, national origin, , ancestry, citizenship, political affiliation, arrest or conviction record not substantially related to a person's job, , citizenship status, membership in the military, or use or nonuse of lawful products off City property during non-work hours or any other characteristic protected by local, state or federal law in all employment practices including terms, conditions and privileges of employment. Reasonable accommodations shall be made for qualified individuals with a disability, unless such accommodations impose an undue hardship on the City. Requests from current employees for accommodations under the Americans with Disabilities Act or under the Wisconsin's Fair Employment Act must be made in writing using forms obtained from Human Resources. Individuals unable to submit this form in writing or needing help in completing this form can contact the Human Resources Department for assistance.

For more information, please refer to the full ADA Title I Policy as outlined on the City's Intranet site.

B. AMERICANS WITH DISABILITIES (ADA)

The City of New Berlin will adhere to all aspects of Title I of the Americans with Disabilities Act (ADA), which prohibits employment discrimination against qualified individuals with disabilities, and Title II of the ADA which prohibits discrimination against qualified persons with disabilities in all services, programs and activities provided or made available to the public.

The City will adhere to the interactive process for any reasonable accommodation request as prescribed under the ADA. Please refer to the city's ADA Title I Policy for further information.

C. ANTI-HARASSMENT, DISCRIMINATION, RETALIATION AND BULLYING

It is the policy of the City of New Berlin that all employees have the right to work in an environment free of all forms of harassment, discrimination, and retaliation and bullying. The City offers fair and equal employment opportunities and prohibits discrimination, bullying and harassment based on an employee's or applicant's age, race, color, creed, religion, disability, handicap, pregnancy, marital or parental status, sex, sexual orientation, gender identity, national origin, ancestry, citizenship, political affiliation, arrest or conviction record not substantially related to a person's job, pregnancy, membership in the military, or use or nonuse of lawful products off City property during non-work hours or any other reason prohibited by state or federal laws. Sexual harassment, whether committed by supervisory or non-supervisory personnel, is unlawful and also specifically prohibited. In addition, the City will not tolerate, condone, or allow harassment, discrimination, retaliation or bullying of an employee or applicant for employment by any non-employees, elected official or third party who conducts business with the City.

All employees are responsible for ensuring that discrimination, harassment, and bullying do not occur. Anyone who believes that he/she has been the subject of discrimination, harassment, or bullying or has knowledge of violations of this policy shall report the matter to the Human Resources Department.

For detailed information on prohibited activity, complaint and investigation procedures, please refer to the full Anti-Harassment, Discrimination, Retaliation and Bullying Policy as outlined on the City's intranet site.

D. WORKPLACE VIOLENCE HAZARD IDENTIFICATION

The City is committed to providing a safe workplace for employees and a safe environment for the citizens of the community. The City has a zero-tolerance policy toward any violent behavior at the workplace. Violent behavior is defined to include, but is not limited to physical assault, aggressive behavior (either physical or verbal) directed at another individual, intentional destruction of property, and intimidation through verbalized or implied threats or destruction of property.

Employees who display intimidating, threatening or violent behavior will be held accountable under City policy and work rules, as well as local, state and federal laws. An employee who harasses, threatens, attempts to inflict or inflicts bodily harm on co-workers, representatives of other agencies, or members of the general public is in violation of this policy. All City managers and employees are responsible for committing to and becoming involved in the prevention of workplace violence and the promotion of a safe work environment.

Any employee who has been subjected to or witnessed a threat of violence or intimidating behavior or has been a victim of or witnessed an act of violence or intimidating behavior related to either City work or on

the job whether by another City employee or third party must report the incident to his/her Supervisor, the Human Resources Department or another available Department Head.

For detailed information on employee's responsibilities, reporting procedures and warning signs, employees can log on to the City's Intranet to review the Safety Policies and Procedures.

E. WEAPONS POLICY

1. Purpose

This Weapons policy is intended to outline expectations for all City employees and volunteers while performing civic duties for the City of New Berlin concerning weapons and to promote a safe environment for employees, citizens, and other individuals that interact with employees of the City. Violations of this Weapons policy will not be tolerated and may result in disciplinary action up to and including termination.

2. Rules Regarding Weapons

- (a) A "weapon" is any device designed as a weapon and capable of producing death or harm to another person and includes but is not limited to, firearms, handguns, knives and explosive devices.
- (b) The possession or control of any weapon by regular full-time, part-time, temporary volunteers or employees in any City of New Berlin facility is strictly prohibited except: for the occasional need to use or possess a City-owned or personally-owned knife, such as utility knife, with a blade no longer than three inches for approved City work; for the Protective Services Sworn Personnel employees in the performance of his/her duties; and as provided in subsection (c) herein below.
- (c) Regular full-time and part-time employees as well as volunteers, other than Protective Services Sworn Personnel employees are prohibited from possessing a weapon, carrying a weapon (openly or concealed), using a weapon, or threatening the use of a weapon in the course of employment or during any part of the course of employment, regardless of whether an employee is physically present on City of New Berlin property or off-site or in a City-provided vehicle.
- (d) This policy does not prohibit employees or volunteers from storing a weapon in their personal vehicle while the vehicle is on City property or while using their personal vehicle during the course of employment. Weapons stored in employees' personal vehicles on City property or while the vehicle is being used in the course of employment with the City must be secured in the vehicle.

F. WORKERS COMPENSATION

Reporting Responsibilities: All employees shall be covered by Worker's Compensation Insurance. Any employee who is injured on the job must immediately report the injury to their immediate supervisor or the Human Resources Department, prior to seeking medical attention if at all possible. The "Work Comp kit" containing the information needed for employees to report the incident can be found in all City vehicles, building main offices, and the Human Resources Department.

All available benefit payments are determined by the Worker's Compensation Insurance carrier.

Return to Work with Restrictions: Should the City determine that work is available for an employee receiving Worker's compensation benefits within physician prescribed restrictions and the City is able to accommodate those restrictions, the employee is required to return to work. Rejection of an offer to return will result in the termination of workman's compensation benefits per the policy of the carrier and may be deemed a voluntary resignation.

For reporting guidelines and detailed provisions, please log onto the City's Employee Intranet.

G. WORKPLACE SAFETY

Adherence to Safety Rules: All employees shall adhere to the City's safety rules, policies, procedures, protocols and regulations and shall report unsafe conditions or practices to the appropriate supervisor.

Disaster Preparedness: All employees must become familiar with building procedures in the event of emergency such as fire, tornado, intruders, etc. Department Heads shall be responsible to manage and communicate their respective Emergency Management Plan and COOP with their departments.

PART II. PROFESSIONAL RESPONSIBILITIES AND EXPECTATIONS

A. WORK SCHEDULE

The City encompasses a wide range of activities and, in effect, operates on a 24-hour a day basis. The workweek for overtime purposes for all employees (except police and fire) runs from Saturday at 0000 hours to Friday at 2359 hours. Unless specified in a labor agreement, the Human Resources Department and Department Heads determine the work schedule for each department. Each employee is responsible for knowing when he/she is expected to be at work and to know his/her schedule. Departments may have a set of "Standard Operating Procedures" on work requirements during an emergency. The employee is expected to know these departmental procedures.

B. ATTENDANCE

The City expects employees to make every effort to be present for work. Employees are expected to adhere to their assigned schedule and arrive on time. Employees are expected to perform all assigned duties and work all scheduled hours during each designated workday, unless otherwise requested or approved by the employee's supervisor. At times, it may be necessary for the supervisor to alter the hours of work and/or schedule to meet the needs of the City.

Employees who are unable to report to work for any reason shall follow the applicable Department Standard Operating Procedures for reporting their absence. A reduction in hours worked, tardiness, a complete day of absence, or any other time off duty must be accounted for in the applicable time off system for the employee. In all instances, approvals must be obtained from the employee's direct supervisor or Human Resources. The City will monitor attendance and absence patterns.

For hourly employees, the exact time of arrival and departure must be accurately recorded daily on an employee's time record. These are legal records and must reflect actual time worked. Time worked includes all time (on premises or off premises) that an employee is required to perform work for the City. Time worked off premises will be limited and only available at a specific time of City need. The City records time worked for hourly employees in fifteen (15) minute increments. The City reserves the right to dock an employee's pay for lateness of increments greater than seven (7) minutes and will dock pay to the next quarter hour.

Salaried employees will observe the normal workday schedule for each Department and additionally may have responsibilities which extend beyond the normal workday including, but not limited to, meetings, special events, and other assignments.

Any deviations from assigned hours including, but not limited to, overtime, compensatory time, (as applicable to hourly employees only), and breaks must have prior approval from the employee's supervisor. Any requests for medical accommodations which would require a deviation from the employee's regular work schedule must be submitted to the Human Resources Department for review and approval.

Employees may not allow anyone to log their time worked, use their ID badge, access code or City keys. Theft of time, improper modifications of time worked records, failure to notify the City of an absence, and/or failure to report to work may result in disciplinary action up to and including termination.

C. SEVERE WEATHER/DECLARED EMERGENCY/CONTINUITY OF OPERATIONS(COOP)

There may be times, during the course of City operations, when emergency situations arise prompting the closing of City facilities/services. Inclement weather is the most common cause of facility closing; however, other emergency conditions may arise in which City Offices would need to close.

City facilities/services may only be formally closed by the Mayor or the Mayor's designee. The City's Continuity of Operations Plan (COOP) for each department will aid in ensuring appropriate levels of staffing, decision-making and continuity of operations. Each Department should reference their respective COOP Plan for direction in the event COOP is to be implemented. Communication of the closure will be via press release, social media and will designate the affected services; Department Heads are responsible for immediately communicating the closure to their staff.

For purposes of closure announcement and the required press release, essential services shall be defined as the following:

- Police Department
- Fire Department
- DPW Department
- Utility Department
- Department of Community Development (all divisions including Emergency Management)
- City's Public Information Officer (PIO) pursuant to the City's Emergency Management Plan and/or COOP.

All other departments shall be defined as nonessential services. **The decision to allow non-essential personnel to work remotely must be communicated in advance to the Mayor's Office including detailing the adequate provisions made to continue to provide normal citizen services and interaction by phone and in person.**

In the event of a Declaration of Emergency and/or closures of City Building(s) each department shall utilize their respective COOP Plans for guidance in direction in terms of reporting, staffing, relocation and/or continuity of their operations. They will see guidance also from their department's COOP Coordinator and then, in turn, the City's overall COOP Unit Team.

During an officially declared closure, affected non-exempt employees shall be paid for actual hours worked. Paid time off will be applied in the following order for hours not worked:

1. Carry Over Vacation
2. Compensatory Time
3. Vacation
4. Unpaid Leave

In addition, as required by the Department of Labor, the City of New Berlin is obligated to pay exempt workers when city operations close. The only instance in which the City of New Berlin is permitted to not pay exempt employees because of inclement weather or other emergency closure situations is when city operations close for an entire week and an exempt employee performs no work during that week.

Department Heads can agree to allow an employee to make up lost time within a work week if it supports business operations. All lost time must be made up in the same workweek in which it occurs, time cannot be transferred from one workweek to another.

D. CONFLICT OF INTEREST – Code of Ethics

A conflict of interest is any judgment, action, relationship, or employment that may benefit an employee or another party the employee is affiliated with because of the employee's position with the city. Employees may not obtain or seek to obtain contractual or other business or financial relationships with the City. No employee may use his/her position in the City to obtain financial gain or anything of more than nominal value for the benefit of himself/herself or his/her immediate family, or for an organization with which he/she is associated, and for which there is no intention or the appearance of an intention to influence the employee in any decision-making processes. Employees must disclose information about any transaction that may be considered a conflict of interest as soon as they become aware to their supervisor and the Human Resources Department. The City Attorney and Ethics Board will address all specific matters relating to the Code of Ethics.

An employee shall not engage in any employment activity or enterprise for compensation outside of his/her City employment if it is inconsistent or in conflict with his/her duties with the City. The City will consider outside employment on a case-by-case basis and determine whether it should be prohibited because of a conflict of interest.

Employees must apprise their Supervisor or Department Head of their intent to engage in outside employment.

Please refer to the City of New Berlin Code of Ethics Policy and Acceptance of Gifts Policy found on the Employee Intranet.

E. CHARGES/CONVICTIONS FOR ACTIVE EMPLOYEES – OBLIGATION TO REPORT

All City employees shall notify the Human Resources Department as soon as possible, but no more than three (3) calendar days after any indictment, charge, conviction, no contest plea, guilty plea, deferred prosecution, or other adjudication of the employee for any of the below:

1. Any felony;
2. Any misdemeanor;
3. Any ordinance violation/ticket related to theft, misappropriation, drug possession, drug paraphernalia possession, or disorderly conduct;

4. Crimes involving attempt by fraudulent or unauthorized means to obtain or alter any certificate, license, or permit necessary for any person to hold or obtain their position with the City of New Berlin;
5. Crimes that occur wholly or in part on City property or at a City-sponsored activity or event;
6. An offense of operating under the influence, revocation or suspension of license, and driving after revocation or suspension if the employee drives or operates a City vehicle or piece of mobile equipment.

An indictment, charge, conviction, no contest plea, guilty plea, deferred prosecution, or other adjudication of the employee shall not be an automatic basis for an adverse employment action. However, if the offense giving rise to the arrest or indictment is substantially related to the employee's job, the City may discipline the employee, up to and including termination.

F. DISCIPLINE

An employee may be subject to disciplinary action, up to and including termination, for unacceptable work performance, violations of City policies and procedures, violations of the provisions of this Handbook, or other cases of misconduct both on and off duty. Many, but not all, of the prohibited behaviors are listed in the City Policy: Employee Code of Conduct. Generally, discipline is progressive in nature and may include counseling, verbal warning, written reprimand, suspension, disciplinary demotion, or termination of employment. Specific disciplinary actions will depend on the behavior and/or frequency of occurrences and may not be progressive. The City reserves the right to adjust the severity of the disciplinary action on a case-by-case basis.

The City may initiate an investigation when an allegation(s) of misconduct is made. The City reserves the right to place the employee on immediate paid or unpaid suspension during the course of the investigation. Every City employee has an affirmative duty to provide to his/her supervisor(s) or any other City official assigned to investigate all relevant and factual information about matters pertinent to such investigation or inquiry. Employees failing to volunteer such information shall receive a directive from their supervisor to provide a statement. If an employee fails to cooperate (including falsifying information, providing misleading information, omitting information, or is nonresponsive) with the City's investigations or inquiries, it will constitute "insubordination," a violation that will be grounds for disciplinary action itself. Upon completion of the investigation, the City may assess and implement appropriate discipline, up to and including termination.

G. EMPLOYEE RIGHTS TO THE GRIEVANCE PROCEDURE

The grievance procedure is intended to provide an orderly process for a prompt and equitable resolution when a concern has not been resolved. The City intends that whenever feasible, grievances be resolved at the lowest possible administrative level.

An employee has the right to bring a grievance to the City's attention without reprisal. Filing a grievance will not adversely affect an employee's employment status.

Employees shall use the following procedure for resolving disputes regarding employee termination, employee discipline, or workplace safety issues.

Failure of an employee to comply with the timelines established herein will be deemed a waiver of the processing of the grievance and the grievance will be denied with no further right of appeal. An employee may advance a grievance to the next step of the process if a response is not provided within the designated timeframes.

DEFINITIONS

- A. The term "Days" as used in this policy is defined as any day that the City's administrative offices are open.
- B. The term "employee termination" as used in this policy shall not include the following:
1. Layoffs;
 2. Workforce reduction activities;
 3. Voluntary termination including, without limitation, quitting or resignation;
 4. Job abandonment;
 5. End of employment due to disability, lack of qualification or licensure or other inability to perform job duties;
 6. Retirement; or
 7. Any other cessation of employment not involving involuntary termination; including but not limited to completion of assignment of a temporary, seasonal, contract, daily assignment, substitute, or replacement employment relationship.
- C. "Employee discipline" as used in this policy shall include any employment action that results in disciplinary action, which typically involves any of three steps: written reprimand, suspension with or without pay, and termination of employment. "Employee discipline," as used in this policy, shall **not** include the following:
1. Plans of correction or performance improvement;
 2. Performance evaluations or reviews;
 3. Documentation of employee acts, verbal corrective conversation, and/or omissions in an employment file;
 4. Administrative suspension with pay pending investigation of alleged misconduct or nonperformance;
 5. Non-disciplinary wage, benefit or salary adjustments;
 6. Counseling meetings or discussions or other pre-disciplinary action; or
 7. Demotion for reasons other than discipline, transfer or change in assignment.
- D. The term "workplace safety" as used in this policy means any alleged violation of any standard established under State law or rule or Federal law or regulation relating to workplace safety.

PROCEDURES

Only individual employees may file a grievance under this policy. Grievances filed by a union or other

representative on behalf of an employee will need to adhere to the grievance procedure as outlined in the respective CBA.

Grievances related to termination shall proceed directly to the Formal Grievance Procedure (Step Two). Granting the requested or agreed upon remedy at any step in the process resolves the grievance.

Informal Resolution (Step One) and Formal Grievance procedures (Step Two) are to be held outside of the employees' workday and will not be compensated.

INFORMAL Resolution (Step one): The employee shall discuss any grievance related to discipline or workplace safety with the employee's immediate supervisor prior to filing a formal grievance with the Human Resources Department. The employee must complete the informal grievance initiation form within five (5) days of receipt of the disciplinary letter or when the employee knows or should have known of the events of the workplace safety issue leading to the informal grievance request.

The supervisor shall schedule the informal grievance meeting within ten (10) days of receipt of the informal grievance initiation form. The parties shall mutually agree upon the date for the meeting which is to be scheduled outside of the employees' workday. There are no witnesses allowed at this meeting, however, witness statements may be provided for consideration. If the employee is not in agreement with the supervisor's decision or the resolution, the employee may move to file a Formal Grievance (Step Two).

FORMAL GRIEVANCE (STEP TWO): The employee shall file the formal grievance form with the Human Resources Director within ten (10) days of the termination, or informal grievance decision.

Administrative Response: The Human Resources Director (or designee) shall meet with the grievant within fifteen (15) days of receipt of the formal grievance form. There are no witnesses allowed for at this meeting, however, witness written statements may be provided for consideration. The Human Resources Director (or designee) shall provide a written response within ten (10) days of the meeting on the formal grievance disposition form.

IMPARTIAL HEARING (STEP THREE): The grievant may file an appeal of the formal grievance disposition (Step Two) by giving written notice to the Human Resources Director within ten (10) days of the issuance of the formal grievance disposition. The Human Resources Director (or designee) shall work with the Impartial Hearing Officer (IHO) and grievant to schedule a mutually agreeable hearing date.

Selection of the IHO: The Administration shall select the IHO. The IHO shall not be an employee of the City. The IHO may be an employee of another City, a retired City administrator (who was never employed by the City of New Berlin), a lawyer, a professional mediator/arbitrator, or other qualified individual. The cost of the IHO will be split evenly between the grievant and the City.

Standard of Review: The IHO shall adhere to specific guidelines set forth by the City regarding hearing procedures. Both parties will be permitted to present witnesses as necessary to establish their case. The Rules of Evidence will not be strictly followed, but no factual findings may be based solely on hearsay evidence. The standard of review for the IHO is whether the decision of the Administration was arbitrary or capricious. Arbitrary or capricious means that the City's action/decision was one which lacked any rational basis or was without consideration or in disregard of the facts. If the decision was not arbitrary or capricious then the IHO is required to find on behalf of the Administration.

IHO Response: The IHO shall file a written response within thirty (30) days of the hearing date. The IHO's written decision for the grievance must contain:

1. A statement of the pertinent facts surrounding the nature of the grievance.
2. A decision as to whether the grievance is sustained or denied, with the rationale for the decision.
3. A statement outlining the timeline to appeal the decision to the Common Council.
4. The IHO shall either sustain or deny the decision of the Administration. The IHO has no authority to modify the Administration's decision nor replace it, in whole or in part, with the requested resolution of the grievant. IF the IHO denies the decision of the Administration, the matter shall be returned to the Human Resources Director for reconsideration.

REVIEW BY THE GOVERNING BODY (STEP FOUR): The non-prevailing party may appeal the decision of the IHO (Step Three) to the Common Council or respective Governing Body. The formal grievance appeal form shall be submitted to the Director of Human Resources within five (5) days of receipt of the IHO's decision.

The Common Council or Governing Body shall not take testimony or evidence; it may only decide whether the IHO reached an arbitrary or capricious decision. The Common Council or Governing Body may, in each situation, decide whether it will review the record and make a decision or whether it will assign the matter to the City's legal counsel for a recommendation. The manner of review is the sole choice of the Common Council or Governing Body. A written decision will be made within thirty (30) days of the filing of the appeal.

The Common Council or Governing Body's written decision regarding the grievance shall include information as to whether the grievance is sustained, denied, or modified. If the decision is modified, the Common Council or Governing Body will specify the new resolution of the grievance and its implementation process.

The Common Council or Governing Body shall decide the matter by a majority vote and the decision is final and binding and is not subject to further review.

H. DRESS CODE / PERSONAL APPEARANCE

Employees represent the City and shall set an example for the community. Dress or attire that a supervisor, Department Head, or Human Resources considers disruptive, perceives as controversial, inappropriate, or which adversely affects the work atmosphere is not allowed. This includes, but is not limited to, clothing and/or accessories, such as lanyards, masks, and pins/buttons.

If employees have questions about whether something is appropriate, they should ask their supervisor prior to wearing it to work.

When assigned to City duty, all employees shall:

- a) Be physically clean and neat;
- b) Cover any body tattoos that show any image that may violate the City's efforts to promote a safe and harassment free work environment;
- c) Dress in a manner consistent with their responsibilities;
- d) Dress in a manner that communicates to others dignity in personal appearance;
- e) Dress in a manner that does not damage City property;

- f) Dress and be groomed in such a way that does not disrupt the work environment, nor cause a health or safety hazard.

If clothing fails to meet these standards as determined by the employee's Supervisor, Department Head, or Human Resources, the employee may be asked not to wear the inappropriate item to work again, may be sent home (without pay, if applicable) to change their clothing, and/or may be subject to disciplinary action.

All office personnel may dress casually on Fridays, or any day approved by the Mayor. Casual attire is expected to maintain a level of decorum and professionalism. Acceptable dress includes suitable clothing for everyday wear outside of work such as jeans, polo and golf shirts, athletic shoes, etc.

I. DRUG, ALCOHOL, AND TOBACCO-FREE WORKPLACE

The City seeks to provide a safe drug-free workplace for all of its employees. Consuming or being under the influence of drugs or alcohol while acting within the scope of their employment is prohibited.

Prohibited Acts - Drugs and Alcohol: The manufacture, distribution, dispensation, possession, use of, or presence under the influence of, alcohol, inhalants, controlled substances or substances represented to be such, or unauthorized prescription medication is prohibited while on City property, while performing job duties/functions, or at City-related activities. In addition, the City will not condone the involvement of any employee with illegal drugs, illegal possession or consumption of a prescription drug, and/or drug paraphernalia, even where the employee is not on City property or performing their job functions.

Tobacco Products, Vaping Products, and other Electronic Nicotine Delivery Systems (ENDS): Employees shall not use tobacco or vaping products, as well as other electronic nicotine delivery systems (ENDS) in City buildings/facilities or in City vehicles.

Reasonable Suspicion Testing: All employees shall be required to undergo alcohol and drug testing at any time the City has reasonable suspicion to believe that the employee has violated the City's policy concerning alcohol and/or drugs. Alcohol or drug testing may be conducted when there is reasonable suspicion to believe that the employee has used or is using drugs or alcohol prior to reporting for duty, while on duty, or prior to or while attending any City function on or off City property. Refusal to consent to testing will have the same disciplinary effect as a positive drug and/or alcohol test.

Additional Testing and Requirements: Employees moving to another position may be required to undergo additional physical examinations/tests or alcohol/drug testing, depending on the classification of their new position. During the pre-employment process, a drug screening may be required according to City hiring practices.

Employees required to possess a commercial driver's license may be required to undergo additional drug testing in accordance with relevant law, DOT regulations, and/or City policies and procedures.

Please refer to the City's Alcohol Misuse Prevention and Anti-Drug Policy posted on the Employee Intranet.

J. EMAIL, CITY AND EMPLOYEE COMMUNICATIONS, TECHNOLOGY

City employees are expected to abide by the Social Media and the Media Relations Policy when using information technology and communication resources. City staff are expected to model appropriate and healthy use of both professional and personal technology, including but not limited to, social media

accounts, email accounts, webpages/sites, online forums and platforms, vlogs/blogs, and/or City educational accounts, resources, and tools. If an employee commits any violation of the provisions outlined in the Social Media and the Media Relations Policy, the City may take appropriate legal action, disciplinary action up to and including dismissal, and any other action to preserve the integrity of the City's property and resources.

K. EMPLOYEE CODE OF CONDUCT POLICY

Though it is not possible to list all forms of behavior that are unacceptable in the workplace, the following are examples of behaviors that would be considered a violation of the employee rules of conduct. Such behavior may result in disciplinary action, up to and including termination of employment. This list is not intended to be exhaustive:

1. Insubordination, and/or failure or refusal to carry out directions, assignments, or instructions;
2. Falsification, unauthorized modification, or alteration of any City or City related documents or records, including applications for employment, whether by omission or commission;
3. Damage, unauthorized use/possession, or removal of City property or another person's private property;
4. Theft, to include but not limited to company property, employee property, services, cash or funds, or time.
5. Possession, use, or sale of any illegal drugs, drug paraphernalia, intoxicants, narcotics, or any other controlled substance on or off City premises;
6. Possession, sale, or use of alcoholic beverages during assigned work hours while attending City activities, or while on any City premises;
7. Reporting to work impaired by illegal drugs, alcoholic beverages, or intoxicants, and/or impaired by the unauthorized consumption or improper use of prescription drugs or other legal substances;
8. Illegal or prohibited possession of firearms or other weapons during assigned work hours, while attending City activities, or while on City premises;
9. Smoking where prohibited by local ordinance or City rules;
10. Failure, refusal, or negligence in the performance of assigned duties;
11. Accepting tips or gifts in the course of work;
12. Unprofessional conduct or behaviors toward City employees or the public;
13. Violation of federal, state, and/or local laws/ordinances which are job- related and/or render the employee unavailable for work due to incarceration;
14. Unauthorized solicitation(s) for any non-City sponsored/approved purpose during assigned work hours or while on City premises;
15. Unexcused or excessive absenteeism or tardiness including failure to follow appropriate reporting procedures;
16. Engaging in unauthorized personal business during work hours or on City premises;
17. Making use of City equipment/materials and/or work time for the purpose of solicitation, promotion, election, or defeat of any referendum, candidate for public office, legislation, or political action or activity;
18. Sleeping or loitering during working hours;
19. Using City equipment, materials, or facilities for personal purposes and/or personal gain;
20. Failure to comply with health and safety requirements and regulations;
21. Threatening, harassing, intimidating, or coercing City employees or the public;
22. Injuring, assaulting, or using abusive language toward City employees or the public;
23. Making malicious, false, or harmful statements about City employees, or the public;
24. Unauthorized accessing, disclosing, sharing, or copying of confidential information or records;

25. Engaging in activity that detracts from the City's image or reputation and/or is in the news media;
26. Failure or refusal to comply with City policies or procedures.

L. FALSE REPORTS

Employees are prohibited from filing false reports or statements including but not limited to the following: accident reports, attendance reports, pay records, insurance reports, physician's statements, pre-employment statements, sick leave requests, personnel records, tax withholding forms, and work reports.

M. NEPOTISM

The City, provided the applicant possesses all the qualifications for employment, may consider an employee's relative for employment. An employee is not permitted to work in a position where their relative is the immediate Supervisor or the Department Head. A relative refers to immediate family and close family as defined under the City's bereavement/funeral leave policy.

PART III. EMPLOYMENT MATTERS

A. EMPLOYEE DEFINITIONS

Each employee is classified as an exempt or nonexempt employee under federal and state wage and hour laws and as full-time, part-time, seasonal or paid intern. This classification is maintained in an employee's personnel record and determines his/her employment status and benefits.

1. **Exempt:** Not covered by certain provisions of federal and state wage hour laws including overtime pay. This includes but is not limited to Directors and sworn public safety command staff not covered by a bargaining agreement.
2. **Nonexempt:** Covered by overtime provisions of federal and state wage and hour laws.
3. **Full-Time Employee:** A full-time employee is defined as an employee working at least 1,560 hours per calendar year or who has a regular work schedule of not fewer than thirty (30) hours per week. These employees are eligible for employee benefits as described in the appropriate collective bargaining agreement or Employee Handbook.
4. **Part-Time Benefits Employee:** A regular part-time benefits employee is defined as an employee working on a regular schedule an average of twenty-nine and a half (29.5) hours but not less than 20 hours per week. Part-time employees are eligible for the employee benefits only as set forth in the appropriate collective bargaining agreement or Employee Handbook.
5. **Part-Time Non-Benefits Employee:** A regular part-time non-benefits employee is defined as an employee working on a regular schedule an average of nineteen and a half (19.5) hours or fewer per week. Employees with this status are not eligible for any benefits.
6. **Temporary or Seasonal Employee:** An employee in the service of the City on a temporary basis

for fewer than fifty-two (52) consecutive weeks per year. Such employees are compensated at an hourly rate and are not eligible for employee benefits. Such employees are also not eligible for Wisconsin Retirement benefits nor are contributions made by the City unless the employee exceeds the required hours in a 12-month rolling period which at that time, worked hours will be reviewed periodically to verify the accuracy of an employee's employment classification. If reclassification is necessary, the employee will be notified.

7. **Paid Interns:** Employees in the service of the City that are a trainee or student working to gain work experience in their field of study or interest. Employees in this classification will work an average of not more than twenty-nine and a half (29.5) hours per week. Such employees are compensated at an hourly rate and may only be eligible for Wisconsin Retirement Benefits if the employee exceeds the required hours in a 12-month rolling period which at that time worked hours will be reviewed periodically to verify the accuracy of an employee's employment classification.

B. CITY PROPERTY

The City may supply an employee with equipment or supplies to assist the employee in performing his/her job duties. All employees are expected to show reasonable care for any equipment issued and to take precautions against theft. Employees may not take City property for personal use or gain. Any equipment, unused supplies, or keys issued must be returned prior to the employee's last day of employment, including, but not limited to employee identification badges, key fob for building entry, keys, iPads/notebooks/tablets, iPods, computers, laptops, phones, and other City resources and materials. City equipment borrowed for short term use should be returned the first workday after project completion.

C. EVALUATIONS

A formal performance review, a coaching technique or a hybrid, formulated by each Department Head and approved by the Human Resources Department, for the management of their staff shall be utilized to assess an employee's performance of job duties contained in his/her position description, as well as the attainment of an employee's personal development goals. Succession planning will be a part of this process.

D. CAREER DEVELOPMENT

Employees are encouraged to take advantage of education and training to improve their job skills and to qualify for transfers and promotions. Costs for education and training may be reimbursed upon request. This reimbursement is limited to training and education, which is relevant to the employee's current position or transfer and promotion opportunities. This benefit is available to all employees on a first-come, first-serve basis, subject to approval by the Department Head and Mayor, and subject to the reimbursement limitations outlined as well as the availability of budgeted funds.

E. CONFERENCES, TRAINING AND SEMINARS

Authorization to Attend Function – The Department Head may authorize or require employee attendance at conferences, seminars, workshops, or other functions of a similar nature that are intended to improve or upgrade the employee's job skills.

Request Procedure – Employee requests to attend training sessions should be made to the Department Head at least fifteen (15) working days prior to the deadline for registration. Department Heads must

approve all staff training/conference requests. Department Heads may also attend conferences as their budgets permit. A “Pre-authorization & Reimbursement Form” is required for any staff member if the Training/Conference will involve costs beyond a registration fee (i.e. mileage, lodging, meals, parking etc.). The Mayor reserves the right to review any conference requests and deny any he or she deems excessive or not applicable.

Costs Covered – When a request for training is approved by the Department Head the employee's cost of registration, tuition, publications, transportation, lodging and per diem will be covered by the City. In addition, the employees’ salary for the day will be paid in accordance with FLSA Regulations.

Personal Education and Training – Employees who desire to further themselves through education or training not related to their work for the City are encouraged to do so. The City will not provide financial assistance for this type of education and training. Employees may be granted, upon written request, permission to take time away from their job for training when such time is taken without pay, as compensatory time, or as vacation time, and only so long as their absence will not cause hardship for their department.

Reimbursement Request – When employees complete such courses they shall provide a certificate of completion and an itemization of reimbursable expenses (with receipts) to the Department Head.

Release Time Policy – In cases where employees have special scheduling problems, reasonable effort will be made to allow employees release time from their work schedule to attend classes in accordance with the City’s flextime policy.

Mileage Reimbursement - Mileage will be reimbursed at the official IRS authorized rate. Whenever an employee is authorized to use a personal vehicle in the performance of official City duties, the employee may be reimbursed, if such mileage does not violate the following conditions:

- (a) All mileage compensation shall be as a result of authorized personal vehicle use. "Authorized" means approved by the employee's Department Head, or in the case of the Department Head, the Mayor. Prior to such approval, the employee shall submit a copy of their auto insurance policy. Employees traveling with their own vehicles on City business are required to have at least \$100,000/\$300,000/\$100,000 of accident liability coverage.
- (b) Driving to and from the usual work site, and trips within the City, is the employee's responsibility and is not mileage reimbursable. (The employee’s time will be compensated according to the “Hours Worked under the FLSA Policy”).
- (c) Reimbursable uses include the use of a personal vehicle to conduct out-of-town City business, or to attend out-of-town functions, training sessions, and meetings when such functions are a requirement of the employee's job or are deemed desirable by the Department Head.

Lodging and Meals - Employee’s lodging and meals expenses will be covered while traveling on City business. Employees are expected to be frugal in the selection of accommodations and meals. Reimbursement requests not deemed to be reasonable for the location and event will not be reimbursed. Meal costs and tips are reimbursable up to the IRS prescribed limit, which can be obtained from the Human Resources Department or City’s Intranet. The City will not reimburse for alcohol purchases. Department Heads may charge business meals to the City or be reimbursed when City business is being discussed.

F. IDENTIFICATION BADGE

All regular full-time and part-time employees are required to have a picture ID card that will include a photograph, name and title of the employee, New Berlin logo, verification information and date of issuance and expiration date, if any. Employees must have the identification cards readily available at all times during their hours of employment with the City. Failure to do so may result in discipline. Cards must be returned to the City upon termination of employment.

G. JOB DESCRIPTIONS

Job descriptions are available for review in Human Resources. At a minimum, the descriptions will include the job title, the title of the supervisor, the minimum qualifications, physical and mental demands, and the essential functions of the position.

H. PERSONNEL RECORDS

The City maintains a personnel file for each employee that includes contact information, job applications, performance evaluations, salary history and other employment records and information. Personnel files are secured in a locked area of the Human Resources Department. Personnel files are the property of the City and the law restricts access to the files.

Employees are required to notify the Human Resources Department within one calendar week of any change in name, contact information, direct deposit, phone number, and/or person to notify in case of emergency.

The City is required to follow the mandatory record and retention schedule as outlined by Federal and Wisconsin employment laws. An employee who wishes to review his/her personnel file should forward the request to the Human Resources Department.

I. CDL REQUIREMENTS

Refer to the City's Alcohol Misuse Prevention and Anti-Drug Policy on the City's intranet.

J. PROMOTION

Where appropriate the City may fill job vacancies by promotion from within the organization. Benefits will be determined based on the original hire date and the employee group for the new position.

K. ACTING/INTERIM APPOINTMENT

The appointment of personnel to a higher classification on a temporary basis in order to fill a vacancy is considered an "acting appointment". An employee holding an acting appointment may receive a temporary pay increase. The Mayor with the recommendation of the Human Resources Department will make decisions regarding this increase. At the completion of such an assignment, the employee shall return to his/her position and salary. No time served as a temporary appointee will apply to the probation period if the acting appointment becomes an official promotion.

(Please note: **Acting** is considered when the employee is filling in due to the absence of the Supervisor/Manager. The Employee must be in an acting role for a period greater than **30 days** to receive

Acting Pay. **Interim** is when the position is vacant due to the Retirement/Resignation/Separation of an individual from the organization).

L. TRANSFER

Employees may from time to time be transferred from one department to another.

M. REDUCTIONS IN STAFF

In the event the Common Council determines it is necessary to reduce the number of staff employed, the City will make every attempt to provide timely and appropriate notification. The following criteria may be used in the review/determination process. This list is not exhaustive, the criteria are not listed in order of consideration or importance, and not all criteria listed below are applicable to all employee groups.

- Needs of the City
- Qualifications and skills
- Training, professional growth and adaptability
- Performance and evaluations
- Length of service to the City
- Certification and licensure
- Professional preparation for job duties
- Professionalism
- Communication skills
- Previous or current discipline
- Collegial and stakeholder relationships

A reduction in force, including layoffs, or dismissal of employment for any reason does not require the City to recall those employees in any order or to recall the individuals at all.

In the event of permanent layoffs, full-time employees may receive severance pay based upon time worked as follows:

Time Worked for the City	Amount of Pay
6 months but less than 2 years	2 weeks of pay
2 years but less than 3 years	3 weeks of pay
3 years but less than 4 years	4 weeks of pay
4 years but less than 10 years	5 weeks of pay
10 or more years	12 weeks of pay

The Mayor or the Human Resources Department may request exceptions to the layoff provisions as it relates to the facts surrounding the layoff on a case-by-case basis with a report to the Common Council.

N. REHIRE PHILOSOPHY

As a practice, the City will not rehire retired employees except in special circumstances, such as covering a temporary leave of absence in a hard to hire area. The employee must have left in good standing and have no documented performance issues in their personnel file dated within the last five (5) years of their employment. The City will comply with all WRS reporting requirements with regard to employee status and is not responsible for any impact on annuity payments based on re-employment.

O. RESIGNATIONS/RETIREMENTS

All employees are requested to give written notice of their intent to resign or retire from their position with the City using the City's Resignation/Retirement Form, which requires employees to provide a forwarding mailing address, email address and phone number. All City keys, property, including intellectual property, and equipment must be returned on or before the employee's last day of in-person work.

Resignation

An employee must provide a minimum of two (2) weeks' notice prior to the resignation to leave employment in good standing. An employee who resigns and gives two (2) weeks' written prior notice will be paid his or her remaining accrued, but unused vacation. An employee who voluntarily terminates employment without giving two (2) weeks prior notice automatically waives his/her right to pay out of any accrued but unused vacation.

Four (4) weeks prior written notice of resignation is required from Department Heads, Supervisors and Managers to leave employment in good standing. A Department Head, Supervisor or Manager who provides four (4) weeks prior written notice of resignation will be paid his/her remaining accrued, but unused vacation. A Department Head, Supervisor or Manager who voluntarily resigns without providing four (4) weeks prior written notice automatically waives his/her right to pay out of any accrued, but unused vacation.

The time specified for written notice of resignation for all city employees shall not include paid time not worked such as vacation or sick leave pay benefits.

Retirement

Employees who wish to retire are required to notify their supervisor and the Human Resources Department in writing at least **one (1) month** prior to the planned retirement date. If the required advance notice is not provided, the employee waives his/her right to any sick leave health insurance premium bank to which he/she would otherwise be eligible.

Department Heads, Supervisors and Managers who wish to retire are required to notify their supervisor and the Human Resources Department in writing at least three (3) months prior to the planned retirement date. If the required advance notice is not provided, the employee waives his/her right to any sick leave health insurance premium bank to which he/she would otherwise be eligible.

The date of retirement or resignation may not be extended by the use of paid leave.

P. RECORDS

Employees shall use confidential information appropriately and with respect for the rights of other employees and the community. Confidential information shall not be used for personal gain/purpose or to the detriment of the City. In the event it is determined that an employee has used access to confidential information for personal gain/purposes or to the detriment of the City, said employee shall be subject to discipline, up to and including termination.

Wisconsin public records: As a public entity, City records and other information may be subject to disclosure pursuant to an open records request as outlined under Wisconsin's Public Records Law, Wis. Stats. § 19.31 et. seq. Employees should be aware that all City-related records are subject to Wisconsin Public Records Law and administrative policy and procedure, including all information transmitted by,

received from, or stored in electronic mail systems and computer hardware and/or software, whether provided by the City or personal.

PART V. PAY AND OTHER COMPENSATION

Employees are paid in accordance with administrative guidelines and an established pay structure. All City positions are classified as exempt or nonexempt according to federal law. The City will comply with all Fair Labor Standards Act provisions and federal regulations mandated by the Department of Labor and other applicable federal regulatory entities. Additionally, as applicable the City will comply with the Wage and Hour/Labor Standards as mandated by the Wisconsin Department of Workforce Development.

Employees will be paid by direct deposit on a bi-weekly payroll distributed over 12 months.

A. FAIR LABOR STANDARDS ACT (FLSA)

It is the policy of the City of New Berlin to comply fully with the provisions of the Fair Labor Standards Act of 1938, as amended, as well as applicable state laws and City of New Berlin collective bargaining agreements. This policy defines the procedures for accrual and use of overtime compensation and compensatory time, and for payroll deductions pursuant to the Fair Labor Standards Act (FLSA).

DEFINITIONS

FLSA: The Fair Labor Standards Act (FLSA) is a Federal law establishing the minimum wage rate, overtime pay, recordkeeping requirements, prohibiting gender-based wage discrimination between men and women performing the same work, and child labor standards affecting full time and part-time workers in the private sector and in Federal, State, and local governments.

Overtime: All hours worked in excess 40 in a work week.

Work Week: A regular work week is a fixed and regularly recurring period of 168 hours -- seven consecutive 24-hour periods designated as the official work week for each employee. Unless otherwise designated, this period will be from Saturday at 00:00 hours to Friday at 23:59 hours.

Work Schedule: The hours each day and days each week that an employee is normally assigned to work.

Work Time "Hours Worked": all time an employee is suffered or permitted to work.

Non-Exempt Employee: An employee who is subject to the minimum wage, overtime and record-keeping provisions of the Fair Labor Standards Act (FLSA).

Full Time (FT): Budgeted position where an employee works on a continuous, year-round basis, in a set role with a regularly recurring work schedule, normally averaging 40 hours per week and is benefit-eligible. Schedules may vary by department.

FLSA Compensatory Time: Time off at a rate of not less than one and one-half hours for each overtime hour worked, in lieu of cash overtime pay.

BREAK PERIODS

The City normally permits full-time employees two break periods of 15 minutes each during each regular full-time work day, work load permitting. Break periods may not be taken consecutively. Break periods are counted as work time and cannot be used to offset other work time in any workweek or if missed taken later in the day or week.

In accordance with the Patient Protection and Affordable Care Act, the City permits employees who are mothers of a nursing child to use these break periods to express breast milk for her nursing child for up to one year after the child's birth each time the need occurs. When such a break is required, the time away from the workstation must be reasonable, i.e., 15 minutes, unless otherwise medically necessary. Managers and supervisors are expected to provide a location, other than a restroom, that is shielded from view and free from intrusion from coworkers and the public for the use of nursing mothers.

MEAL PERIODS

The City customarily allows a 30-minute meal period for full-time employees. Meal periods are not hours worked and are not paid except when the employee is not completely relieved of duties.

A bona-fide meal period of 30 minutes or more is not work time. If an employee is required or permitted to work during the meal period, then this must be counted as work time. Example: If a secretary eats at the desk, continues to answer the phone, receive the public, etc., the meal time would have to count as work time and if not offset at some other point within the week, would result in overtime work and extra compensation.

ON CALL AND CALL BACK TIME

Employees that are non-exempt that respond to an after hour emergency or alarm will receive a minimum of two (2) hours of over-time pay or compensatory time and will work the time required by the Supervisor unless otherwise stated in applicable department SOP's or a collective bargaining agreement.

Shift Call-in: occurs when the work time is within 2 hours prior to the start of the regular schedule for the employee.

Shift Call-back: occurs after the employee has worked their schedule hours for the workday and are no longer on the City premises at the time the call back is initiated.

On-Call: Employees designated to be on call should refer to their Department's Standard Operating Procedures for compensation.

OVERTIME

Only non-exempt employees may be compensated for overtime at the time-and-a-half rate with compensatory time off (comp time) or direct pay. All overtime must be approved by the employee's supervisor prior to the employee working the additional time. If overtime is worked and not approved by the supervisor prior to the work being completed, the employee will be subject to discipline, up to and including dismissal.

For non-exempt hourly employees, overtime will be calculated based on a forty (40) hour work week. Paid leave (with the exception of jury duty and official work duty) will not be included in the forty-hour work week calculation.

Employees will be required to work according to the needs of the City as determined by the employee's supervisor(s).

TRAVEL TIME

Determination of whether travel time is counted as hours worked for non-exempt employees will be determined under applicable FLSA regulations.

MEETINGS/TRAININGS

1. Attendance at authorized meetings, trainings, and similar activities are counted as time worked unless all the following criteria are met:

- a. The attendance is outside of the non-exempt employees' regular hours;
- b. The attendance is voluntary;
- c. The meeting, training, or similar activity is not directly related to the non-exempt employees' positions; and
- d. The non-exempt employees perform no work related to their positions while in attendance.

2. Non-exempt employees attending trainings/seminars that require travel outside of the employee's normal work schedule will be paid at their compensatory/overtime rate.

3. Non-exempt employees attending trainings/seminars that require overnight stays will only be paid for the time that they attend the training and travel time and not the total time they are away from home.

4. Lunch breaks at training are not considered time worked for non-exempt employees, provided the employee is free to leave and there is no formal instruction during the lunch period.

COMPENSATORY TIME

Non-exempt employees may accumulate a maximum balance of 60 hours per calendar year. This number may be less per Department based on what that Department Head deems appropriate. The use of Comp time will be determined by the Department Head and the Cascading rule.

All compensatory time accrued but not used by the end of the fiscal year (December 31st) will be paid on the next payroll processing. Comp time carry over is not permitted.

The Department of Public Works and Utilities Field Workers will be allowed to accumulate a maximum balance of 100 hours per year to support operational needs within the respective departments. All compensatory time in excess of twenty-four (24) hours that is accrued but not used by the end of the fiscal year will be paid out on the next payroll processing date. Up to twenty-four (24) hours of compensatory time will automatically be carried over into the new fiscal year unless an employee requests these hours to be paid out. Employees must submit the request in writing to the Department Head for review no later than December 1st. The Department Head reserves the right to deny any such requests due to operational and budgetary needs.

Upon termination of employment, any FLSA Compensatory Time balance must be paid in full at the employee's current applicable rate or the employee's average hourly rate over the past three years, whichever is higher.

Non-Exempt employees that are promoted to a position that is classified as Exempt will be paid out all accumulated compensatory time prior to moving into the Exempt position. In addition, when an employee is transferring from one City Department to another, the transferring out department must pay out all FLSA Compensatory time, and earned holidays (Public Safety Only), that the employee has accrued prior to the first day of work within the new department.

Payment for previously accumulated FLSA Compensatory Time for an employee who is not terminating must be approved by the Department Head and the Director of the Human Resources Department prior to being processed by the City Payroll Department.

B. DIRECT DEPOSIT

All employees shall participate in a direct payroll deposit plan. Pay stubs may be accessed under the Employee Self Service site. Each employee shall have access to their electronic pay records.

C. DEDUCTIONS AND GARNISHMENTS

Pay is subject to all deductions required by law. The amount of the deductions will depend on earnings and the number of exemptions claimed on individual W-4 forms. If an employee wishes to change their exemptions or additional withholdings, he or she must request, complete, and return a new W-4 form to the payroll office.

Voluntary deductions may be deducted from an employee's pay at the direction of the employee. This may include, but is not limited to, benefit payments for benefit plans offered by the City, charitable donations, etc. They must be authorized by the employee in writing and submitted for approval to the Finance Department and/or Human Resources Department.

Should employment be severed and monies are due to the City for any reason, unless other arrangements have been agreed upon by the City and the employee, the City will deduct those funds from any remaining payments due to the employee. This includes payroll as well as reimbursement expenses and voluntary deductions.

The City is required to honor garnishments, wage assignments, and levies as prescribed by law. Properly authorized garnishments require withholding pay based upon a formula established by law. The Finance Department notifies all individuals for whom garnishments are received.

PART VI. LEAVES AND ABSENCES

Employees available paid leave hours will be noted in Employee Self Service – Time Off. All paid time off may be allowed in increments of fifteen minutes (.25 hours) up to the maximum of an employee's regularly scheduled hours per day.

Employees hired during the year will receive a prorated amount of paid leave. Part-time employees will receive leave on a pro-rated basis based upon the number of hours they are scheduled to work.

Requests for approval of any time off shall be entered into the appropriate time off system and shall be made

as far in advance as possible (minimum of ten (10) calendar days except under emergency circumstances). Administration has the right to approve or deny all requests. It is at the City's discretion as to how many employees will be granted leave on any particular day based on City needs. If the City is unable to meet City needs, the City may cancel prior approved time off.

An employee will not be permitted to work for another employer while on a leave of absence, FMLA leave, worker's compensation leave, or while absent due to illness from the City, except as allowed by applicable law.

A. BEREAVEMENT/FUNERAL LEAVE

Employees will be granted paid time off for purposes of bereavement and to attend funeral services. If a specific title/relationship is not listed in the policy below, then bereavement leave will not apply.

Immediate Family: Five (5) consecutive workdays with pay as approved by the employee's immediate supervisor. Immediate family will only include spouse, children, stepchildren, parents, siblings, parent-in-law, and domestic partner (if registered prior to April 1, 2018). An employee may take additional days off by using compensatory or vacation time.

Close family: Three (3) consecutive workdays with pay as approved by the employee's immediate supervisor. Close family will only include grandparents, grandchildren, **step-mother, step-father, step-sister, step-brother**, brother-in-law and sister-in-law.

Other Relative: one (1) day with pay. Relative will include aunts, uncles, nieces, or nephews of the employee or his/her spouse. Grandparent-in-law is also included.

Circumstances may allow bereavement leave to be taken in part or whole as nonconsecutive time off with proper supporting documentation. This must be approved through the Department Head and Human Resources.

B. FAMILY AND MEDICAL LEAVE

In accordance with Federal and State law, the City will provide family and medical leave to eligible staff for certain qualifying leaves. To determine if you are eligible or qualify for family and medical leave, please refer to the City Policy Family and Medical Leave Act (FMLA) or contact the Human Resources Department. This policy is intended to conform to and comply with, but not exceed, the requirements of the Federal Family and Medical Leave Act of 1993 (FFMLA) and the Wisconsin Family and Medical Leave Act (WFMLA). To the extent that this policy is ambiguous or conflicts with the FMLA or WFMLA, the FMLA and the WFMLA will govern. When leave taken by staff is governed under both FFMLA and WFMLA, the more generous provision will apply.

In the event that a paid holiday falls within a period when an employee is on an approved FMLA leave, it shall be charged as a paid holiday and not deducted from the employee's earned sick leave.

For more information, please refer to the City's Family and Medical Leave Policy posted on the Employee Intranet.

C. HOLIDAY PAY

In order to be eligible for holiday pay, an employee must be in paid status the day prior and the day after a City identified holiday to receive the holiday pay as outlined, unless on an approved FMLA leave.

The City offers the following paid Holidays:

New Year's Day
Good Friday
Memorial Day (observed on the last Monday in May)
Independence Day
Labor Day (observed on the first Monday in September)
Thanksgiving Day
Friday after Thanksgiving
Day before Christmas Day
Christmas Day
New Year's Eve Day

Holidays falling on Saturday will be observed on the preceding Friday unless the preceding Friday is also a Holiday. In that case, the Holiday will be observed on the following Monday. Likewise, Holidays falling on Sunday will be observed on the following Monday unless the following Monday is also a Holiday. In that case, the Holiday will be observed on the preceding Friday. This policy applies to all eligible employees working Monday through Friday.

- Regular Full-time (Exempt & Non-Exempt) employees as defined by this handbook are eligible for holiday pay benefits for either the actual or the observed holiday.
- Regular Part-time benefit employees whose normal work schedule falls during designated holiday hours will receive compensation for the hours they would have been scheduled to work.
- All non-exempt regular full-time and part-time benefit employees who are called in to work on an actual holiday will accrue compensatory time at two times their normal rate of pay. Only if an employee has reached their maximum comp time accrual will they be paid out two times their normal rate of pay for hours worked on an actual holiday. If said employee is called into work on an observed holiday that does not correspond with the actual holiday, they will be paid one- and one-half times their normal rate of pay for hours worked.
- All non-exempt regular part-time non-benefit, seasonal and temporary employees who work on an actual holiday will be paid at two times their normal rate of pay for the hours worked. If said employee is called into work on an observed holiday that does not correspond with the actual holiday, they will be paid one- and one-half times their normal rate of pay for hours worked.

D. JOB ABANDONMENT

Employees who fail to report to work or contact their supervisor for three (3) consecutive workdays or employees who fail to return from approved leaves of absence [i.e. FMLA, worker's compensation, unpaid leave of absence] on a specified return date without prior notice to their supervisor shall be considered to have abandoned their job without notice. Supervisors shall notify the Human Resources Department at the expiration of the third workday and initiate the paperwork to terminate the employee. Employees who abandon their jobs are ineligible to receive accrued benefits and are ineligible for rehire.

E. JURY DUTY LEAVE

Employees may participate in jury duty and receive full salary if the jury duty is at a time the employee is scheduled to work. The letter of jury duty notice must be submitted to the Human Resources Department

prior to that date. Monies paid for jury duty shall be given to the Human Resources Department to qualify for full salary. Reimbursable items (mileage and parking) will be returned to the employee. Employees must return to work on any scheduled workday that jury duty dismisses prior to or at noon.

F. MILITARY LEAVE

Employees will be granted all military leave rights available under the Uniformed Services Employment and Re-employment Rights Act (USERRA). Upon notification of the need for military leave, employees shall request leave through the Human Resources Department and notify their supervisor. The request must be accompanied by a copy of the military orders.

G. RELIGIOUS OBSERVANCES

The City is required to reasonably accommodate an employee's religious beliefs or practices, unless doing so would cause more than a minimal burden on the operations of the employer's business.

H. VOTING LEAVE

If an employee cannot vote at his/her assigned polling place either before or after the employee's scheduled work hours for reasons outside of the employee's control, the employee will be permitted to be absent from work to vote. The employee's supervisor will determine the time that the employee will be permitted to leave work to vote based on the needs of the department. Time absent from work may only be used to travel to and from the employees' assigned polling place and to vote. The employee may use vacation or personal time off to be paid for the time away or may elect to be unpaid for the time away from work. Employees may also exercise their right to vote by absentee ballot.

I. FLEX TIME

Exempt employees under the FLSA are expected to work the hours necessary to adequately perform their jobs. Often this means working more than 40 hours per workweek. Exempt employees are not eligible for overtime pay or compensatory time off on an hour for hour basis. Occasionally exempt employees may take time off to compensate for extra hours worked with the approval of their supervisor, Department Head or Human Resources, which the City recognizes as flextime.

J. SICK LEAVE

Each eligible employee shall accumulate one (1) day of paid sick leave per month worked pro-rated by the number of hours per day they are scheduled to work. Newly hired employees' will be credited sick leave based upon their first workday. If an employee's status changes from full-time to part-time or part-time to full-time during the year, the sick time hours that can be accumulated monthly will change on the first full month following that status change.

Accrued sick leave is not paid out upon termination of employment.

Use of available sick leave shall be applicable to absences as detailed below:

1. Serious health conditions, illness, or injury of the employee, a spouse, dependent child, or parent. If leave is qualified under FFMLA or WFMLA, the use of sick leave may be applicable beyond this definition.
2. Medical or dental appointments for the employee and/or dependent child that cannot be scheduled outside of the employee's regularly scheduled work hours. It is expected the

employee report to work during scheduled work hours before and/or after the scheduled appointment.

3. At the request of the employee, sick leave pay may be used to compensate for the difference between Worker's Compensation benefits and full pay after an absence of 60 workdays.

Sick leave is a paid absence from duty and may be utilized by employees according to the reasons outlined in this handbook. Reasons and circumstances the City and its departments may inquire into or investigate sick leave use may include, but are not limited to, the following:

1. Habitual use of sick leave in single or partial day increments without valid or current medical documentation.
2. Sick leave consistently used in conjunction with time off.
3. Sick leave taken before or after a holiday.
4. Sick leave used to avoid working overtime or holidays.
5. Sick leave consistently taken the same time each year.
6. Sick leave taken for the day the employee was denied an off request.

When possible, each employee will be required to inform his/her supervisor prior to his/her normal daily starting time of his/her need to be absent due to illness. Whenever the supervisor or Human Resources deems such verification appropriate, the employee may be required to furnish the City with medical substantiation of the illness signed by either a licensed physician or a nurse practitioner. Such certificate shall be in its original form (not a copy) and include the date(s) and medical reason why the employee could not report to work. The medical substantiation must also include a statement releasing the employee to return to work and a statement as to whether any limitations or restrictions are placed upon the work which may be performed.

Any continuous leave of three (3) or more workdays must be reported to the Human Resources Department. Employees will be required to furnish a medical excuse to Human Resources under the terms and conditions as stated above. Failure to provide appropriate medical substantiation within three (3) days of the absence will be deemed an unexcused, unpaid absence and subject to discipline, up to and including termination.

K. OFFICIAL RECORD OF LEAVE

The Payroll division of the Finance department shall maintain an accurate and permanent record of all accrued time for each employee.

L. UNPAID LEAVES OF ABSENCE

Any unpaid leave of absence for any reason beyond those covered by the Family Medical Leave Act (FMLA) may be granted at the discretion of the City. An employee who has completed six months of continuous employment with the City may request an unpaid leave of absence. A formal request and circumstances for the leave must be sent to the Department Head and Human Resources Department as soon as the need is known but no less than four (4) weeks in advance of the unpaid leave. An unpaid leave of absence may be obtained for a variety of employee-requested reasons and will be granted based on an individual's circumstances and the needs of the City. An unpaid leave of absence shall not be used for vacation or to extend a holiday. All applicable leave must be exhausted before an unpaid leave will be allowable. Any request for an unpaid leave of absence must be made in writing and offer a reasonable justification for, and expected duration of, the requested leave. During an approved leave of absence,

seniority shall be continued in effect for the duration of the unpaid leave of absence up to a maximum of one (1) year.

The Department Head may recommend either approval or denial of a leave of absence request based upon City needs and business considerations, circumstances of the request and/or applicable state or federal laws (e.g., staffing needs, employee disability, military obligations, family crisis, unusual circumstances, etc.). Personal unpaid leave may be granted up to thirty (30) working days based on the individual request. The Common Council must approve leaves in excess of thirty (30) days.

During an approved unpaid leave of absence less than thirty (30) days, all benefits and accruals will continue without interruption. If an unpaid leave of absence extends for a period greater than thirty (30) days, benefits will be termed in accordance with the terms of our carrier partners and applicable COBRA/continuation paperwork will be mailed out to the employee. Upon return to work, benefits will be reinstated in accordance with the terms of our carrier partners. During the unpaid leave, the employee shall retain accumulated paid leave but shall not accrue any additional paid leave. Unpaid medical leave, the term of such leave, and participation in insurance programs under this section outlined above shall run concurrently with any leave(s) and benefits provided for under the Wisconsin Family and Medical Leave Act and/or under the federal Family and Medical Leave Act.

Return to Work: Upon return from any unpaid leave of absence, the City reserves the right to assign the employee to a position equivalent in terms of percentage of employment or prior position assignment, unless the employee's percentage of employment or prior position assignment was reduced or increased due to a reduction in force, whichever is applicable.

If the employee is taking the unpaid leave of absence for a medical reason for themselves, the employee will be eligible to return to work once he/she is physically able, provided: 1) the employee has indicated his/her intent to return, and 2) the employee has provided his/her physician's certification that he/she is able to return to work. The City reserves the right to designate another physician to confirm or refute the employee's physician's certification. The City shall cover all costs associated with a second certification.

A failure to return after expiration of the unpaid leave will be considered a voluntary resignation of the employee's position with the City. It will also constitute a waiver of any and all rights to further employment by the City.

M. UNEXCUSED ABSENCE

An unauthorized absence from duty by an employee shall be grounds for disciplinary action, up to and including discharge. Unauthorized absence of an employee for three (3) consecutive workdays may be considered by the City as a resignation of said employee. If an employee is a "no show" for a period of 3 days, the resignation enforced will also forfeit any and all accruals other than those required by law (i.e. hours worked, compensatory time). City policy on absences is part of the Employee Code of Conduct Policy.

N. SICK LEAVE DONATION

The City recognizes that employees may have a family emergency or a personal crisis that causes severe impact to them resulting in a need for additional time off in excess of their available paid time off. The City sponsors a sick leave donation program under which employees may donate some of their accrued but unused sick leave. The sick leave donation program is required to be administered within the guidelines of the IRS. The donation of sick leave time is strictly voluntary.

Eligibility for Donating Sick Leave

Employees who wish to donate paid time off from their unused sick leave accrual balances must satisfy the following requirements:

1. Must be employed with the City for a minimum of 1 year
2. Must maintain their own personal sick leave balance of thirty (30) days (240 hours)
3. May not donate more than a total of ten (10) days (80 hours) annually to one individual
4. May not donate more than a total of twenty (20) days (160 hours) annually

Employees who wish to donate sick leave must submit a written and signed request on the City's Sick Leave Donation Form. These days will be subtracted from that employee's current sick leave bank of days available to them. All unused donated days will remain in a sick leave bank that will be accessible by other eligible employees. The bank will only be allowed to accrue to a maximum of 360 days from all sources. The City will request general donations on an annual basis.

Eligibility for Receiving Donated Sick Leave

An employee must satisfy the following criteria to benefit under this Policy:

- The employee has been employed with the City for a minimum of 12 consecutive months.
- The employee is eligible to accrue sick leave.
- The employee is on an approved leave of absence relating to a medical emergency.
- The employee has provided appropriate documentation as requested by the City.
- The employee has exhausted all applicable paid time off and leave, including vacation, sick leave, bereavement leave, and comp time benefits.
- If a person should become eligible for long term disability benefits, sick leave days are no longer available to them. Should a person exhaust their long-term disability benefits, they are no longer able to access donated sick leave days.

Some factors which will be taken into consideration are the serious and chronic nature of the condition, the specifics of the situation, the employees' performance, attendance record, and compliance with City policies and procedures.

For purposes of this policy, a "medical emergency" is defined as a serious illness or other medical condition (such as a heart attack or cancer) of the employee or the employee's family member to include the spouse, dependent child, or dependent step-child that requires the employee to be absent for a prolonged period of time, including intermittent absences related to the same illness or condition and will result in a substantial loss of income to the employee.

Requesting and using donated sick leave:

An eligible employee must submit a written request to the City outlining the reason for the request and the amount of sick leave requested. The City reserves the right to determine in its sole discretion whether a request satisfies all the criteria set out in this policy.

Requests for donated sick leave are not guaranteed. If more than one eligible employee requests leave from the donation bank, requests will be granted on a first-come, first-serve basis.

Donations may only be used to compensate the recipient-employee for approved time off. Donated sick leave may not be used for unapproved absences.

Donations will be processed at the recipient-employee's rate of pay. Eligible part-time employees who receive donated sick leave will be paid based on their regularly scheduled hours of work.

Donated sick leave is not paid out on a separation of employment. If the employee returns to work before exhausting donated sick leave, the remaining donated sick leave will revert to the sick leave bank and become available for other eligible employees.

Employees will continue to accrue paid leave while using donated sick leave. Accrued paid leave will be applied to the leave of absence as it is earned prior to applying any donated sick leave.

PART VII. BENEFITS

An employee must be regularly scheduled to work 30 or more hours per week to be eligible to enroll in the full benefit program offered by the City. If a variable-hour employee averages at least 30 hours per week for a complete measurement period as determined by the City, they will become eligible for health, prescription drug and flexible benefit plans for the following stability period. The variable hour employee will remain eligible throughout the stability period regardless of a change in the employment status (including, but not limited to, a reduction in hours) in accordance with the Patient Protection and Affordable Care Act. All City benefits whether 100% City paid, contributory (paid for by both the employee and the City), or voluntary (paid for by the employee) will be subject to the summary plan description or plan document of that plan. Should there be a discrepancy between the summary plan description or plan document and any oral statements, clerical/administrative error or other written document, the summary plan description or plan document shall be the governing document.

The City reviews costs and quality of the benefit program on a regular basis. Benefits are subject to change at the discretion of the City. Details of all available benefits described in this section are available in separate booklets on the City's Employee Intranet or upon request.

Health, prescription drug and flexible spending account benefits are effective the employees first day of work. Dental, vision, life and long-term disability benefits are effective the first of the month following the employees' first day of work. If an employee ceases employment, coverage for health, prescription drug, dental, vision and flex benefits will terminate at the end of the month in which the last workday occurs; life and disability benefits will terminate effective the last day worked.

New employees must complete enrollment forms within the first 30 days of employment and there are no allowable exceptions. Employees may enroll in benefits at time of initial eligibility, open or annual enrollment (if applicable according to the plan), or according to corresponding life events (i.e. loss of spouse's job resulting in insurance loss, birth, death, marriage, divorce, etc.). If you do experience a qualifying event, you are responsible for notifying the Human Resources Department within 30 days of the event to make a corresponding enrollment change. You are required to demonstrate or provide appropriate documentation to the Human Resources Department to establish that the life event has occurred and the date of the event to make the change.

A. HEALTH AND PRESCRIPTION DRUG INSURANCE

The City may provide health and prescription drug insurance to eligible employees. The insurance carrier(s), program(s), and coverages will be selected and determined by the City. Eligibility for, payment toward coverage, and specific benefits for individual employment groups are set forth in the City of New Berlin Benefit Guidebook.

Health Reimbursement Account (HRA): If an employee is enrolled in the City's health plan, they are automatically enrolled in the City's health reimbursement account benefits. These benefits are subject to the rules of the carrier.

Health Savings Account (HSA): The City offers one or more qualified High-Deductible Health Plans (HDHP). Upon enrolling in a City HSA-qualified HDHP, an employee may be eligible to establish and fund an HSA. The City contributes to an employee's HSA based upon enrollment in the health plan. The City may change the contribution level at any time.

B. DENTAL INSURANCE

The City may provide dental insurance to eligible employees. The insurance carrier(s), program(s), and coverages will be selected and determined by the City. Eligibility for, payment toward coverage, and specific benefits for individual employment groups are set forth in the City of New Berlin Benefit Guidebook.

C. VISION INSURANCE

The City may provide vision insurance to eligible employees. The insurance carrier(s), program(s), and coverages will be selected and determined by the City. Eligibility for, payment toward coverage, and specific benefits for individual employment groups are set forth in the City of New Berlin Benefit Guidebook.

D. EMPLOYEE ASSISTANCE PROGRAM

An Employee Assistance Program (EAP) is available to all City employees and family members. Utilization of the EAP is available 24/7, is free of cost, and is confidential. This voluntary program is designed to promote the well-being of employees and their immediate family members. EAP can provide assistance with multiple concerns including:

- Family and relationship problems
- Child and elder care resource locations
- Anxiety/Depression/Stress/PTSD
- Legal/Financial/Vocational concerns
- Alcohol and other drug related problems

E. FLEXIBLE SPENDING ACCOUNTS

The City will provide an Internal Revenue Service authorized cafeteria plan/flexible spending account (FSA) under applicable sections of the Internal Revenue Code (§ 105, § 106, § 125 and § 129) to permit employees to reduce their salary and contribute to an FSA to cover the following expenses:

1. Payment of insurance premium amounts (IRC § 106);
2. Permitted medical expenses not covered by the insurance plan (IRC § 105);
3. Dependent care costs (IRC § 129).

F. LIFE INSURANCE

Life insurance is provided to each regular full-time City employee at no cost. The coverage benefit amount is one (1) times base annual salary at the time of death with double indemnity for accidental death. Employees are eligible to purchase supplemental life for themselves, spouses, and children.

G. LONG-TERM DISABILITY

The City will pay 50% of the premium and the eligible employee is responsible for the remaining 50% of the premium. The policy currently pays out at 60% of monthly base salary to a maximum of \$2,700

per month.

H. RETIREMENT SAVINGS PLAN

The City will provide the opportunity to all eligible employees to participate in a 457 Voluntary Retirement program. If an employee chooses to establish a 457 account with one of the City's approved vendors, the City will deduct employee contributions through payroll deduction upon the request of the employee.

I. WISCONSIN RETIREMENT SYSTEM (WRS)

City employees who are eligible to participate under the rules and regulations set by the Wisconsin Retirement System are automatically enrolled.

The City agrees to contribute the employer's share. The employee agrees to pay the employee's required WRS contribution as required by state statute. The rate for the employer and employee contribution to WRS is determined by the Employee Trust Fund (ETF) Board at least annually.

WRS Information:

Link: <http://etf.wi.gov/contact.htm>

Phone: 608-266-3285

Fax: 608-267-4549

J. RETIREMENT BENEFITS

Accrued sick leave will *not* be paid out upon termination of employment. For full-time employees who retire under the terms of the Wisconsin Retirement System, and are currently enrolled in the City Health Insurance Plan, the City will establish a premium bank based on the following guidelines:

The sick leave premium bank is developed by multiplying an employee's unused sick leave hours by his/her hourly rate at the time of retirement multiplied by a rate of 50%. Money from the sick leave premium bank may only be used for health insurance premiums for health insurance plans offered by the City and cannot be disbursed to any employee or health insurance plan not sponsored by the City. For any eligible employee hired after 1/1/2018, the maximum number of sick hours that will be allowed for sick leave premium bank purposes is 960 hours (120 days).

Employees must begin utilization of their sick leave premium bank effective the first of the month following their date of retirement. COBRA will run concurrently with the use of the sick leave premium bank. Upon depletion of the sick leave bank, retirees will be allowed to remain on the City's health plan per applicable COBRA laws and standards to the maximum of 18 months following the date of retirement. If a retiree has money left in their sick leave premium bank at the time they become Medicare eligible, they shall be allowed to utilize the sick leave premium bank money toward Medicare supplement insurance, for the retiree only, as chosen by the City up to a maximum of five years.

In the case of death of a retiree, the legally married spouse of the retiree will be entitled to any remaining funds in the retiree's sick leave premium bank for the continuation of health care benefits until the earlier of the deceased retiree's sick leave bank is exhausted, the deceased retiree's spouse reaches Medicare eligibility, or the deceased retiree reaches Medicare eligibility.

K. VACATION

Regular full-time and part-time eligible employees hired after 1/1/2018, are allocated vacation “up-front” calculated on a fiscal year basis (January 1 – December 31). Vacation will be allocated upon hire and subsequently on 1/1 of each year thereafter. Vacation will be pro-rated based on an employees’ first scheduled workday. Regular full-time and part-time eligible employees hired prior to 1/1/2018 earn vacation in arrears.

Vacation time is pro-rated based on the number of hours an employee is scheduled to work for the year. If an employee was hired prior to 1/1/18 vacation will be based on the total hours worked the previous year.

An employee that ends the employment relationship prior to the end of the fiscal year will have the vacation pro-rated based on the last day worked and, in some cases, may need to re-pay vacation used but not earned. The City will deduct any used but not earned vacation from the employee’s final paycheck. (i.e. – an employee receives twelve days on 1/1 and utilizes all twelve days on 2/1 but decides to resign and leaves employment on 3/1. The employee utilized 10 additional days then what they had earned for the year so those additional days would be deducted from their final check). **Employees who separate employment from the City within the first six (6) months of their benefit eligible hire date are not eligible for any vacation payout.**

All Regular Non-CBA Full-time employees, working a 40-hour work week, earn vacation benefits according to the following vacation schedule:

<u>Vacation Earned</u>	<u>Period of Service Required</u>
12 days	After one (1) year of employment
13 days	After three (3) years of employment
15 days	After five (5) years of employment
17 days	After seven (7) years of employment
20 days	After ten (10) years of employment
23 days	After fourteen (14) years of employment
24 days	After fifteen (15) years of employment
27 days	After nineteen (19) years of employment
29 days	After twenty (20) years of employment

Non-CBA Fire Staff working a 56-hour workweek will follow the contractual vacation schedule (i.e. battalion chief, division chief).

Up to 40 hours of vacation may be carried over from the previous year, pro-rated based on hours worked per week. Non-CBA fire staff working 56-hour work weeks may carry over a maximum of 48 hours of vacation. Vacation carry over will automatically be rolled over to the new year on the last pay period in December.

Scheduling Vacation

Vacation hours utilized must match the employee’s normal work schedule (i.e. an employee who normally works 4 hours on a Monday can take 4 hours’ vacation that day). Preference in vacation scheduling may be based on seniority provided that requests are made within a reasonable time. Employees must follow the vacation request process as communicated by their Supervisor or outlined in their Departments procedures.

Vacation for Employment Status Change

An employee whose employment status changes from part-time to full-time or full-time to part-time throughout the year, will have their vacation pro-rated the first full month following their status change. For employees hired prior to 1/1/2018, the vacation accrual on the first of the year following the change will be pro-rated based on the actual hours the employee was paid the prior year.

Call-In during Scheduled Vacation

If an employee is called in to work due to extenuating circumstances and they have a scheduled vacation, the employee vacation request will be reduced based on the number of hours worked for that day, unless it is outside their normal work hours. If the call in occurs outside their normal work hours, for a non-exempt employee, applicable FLSA rules and Department Procedures will be applied.

L. WORK FROM HOME

The City of New Berlin values hard work, collaboration and teamwork, and expects all employees to report to work on site for their regularly scheduled work hours. However, we understand there may be circumstances that may prohibit an employee from physically reporting to work and working from home may be in the best interests of the City and the community we serve. Working from home is not a City-wide benefit.

Employees who are eligible to work from home must:

1. Be able to perform their essential functions of their role remotely;
2. Not have a role that requires frequent in-person contact with the community and coworkers;
3. Have been employed with the City of New Berlin for a minimum of twelve (12) months of continuous, regular employment;
4. Have a satisfactory performance record;
5. Have duties that can be met through basic hardware and software which is available to them remotely.

Typically, positions requiring face-to-face interaction with customers, protective services and field personnel do not meet remote work requirements. The City does not allow staff to have regularly scheduled work from home days. An eligible employee may be approved to work from home to include, but not limited to, the following reasons:

1. Emergencies;
2. Extenuating Circumstances;
3. The Mayor is authorizing it due to inclement weather;
4. The Mayor has closed City Hall;
5. In accordance with the Departments COOP Plan.

Department Heads may approve an eligible employee to work from home on an as needed basis only. The Department Head will be required to complete the Work from Home form and submit it to the Mayor's Office and the Human Resources Department for any approvals for employees to work from home. The Department Head must outline the reason and that adequate provisions have been made to continue providing normal citizen services and interaction by phone and in person within their Department. The Human Resources Department will enter the work from home day into the timekeeping system.

Other informal, short-term arrangements may be made for employees on family or medical leave to the extent practical for the employee and the organization and with the consent of the employee's health care provider, if appropriate. These requests will be managed within the Human Resources Department in collaboration with the employee's supervisor and the Mayor's Office if necessary.

The Mayor's Office and the Human Resources Department may monitor employees working from home through the timekeeping system and network logins.

PART VIII. GENERAL PERSONNEL GUIDELINES

A. GENERAL CONDUCT

All City employees are expected to meet a standard of conduct appropriate to the reputation of the City. While at work, employees are responsible for being aware of and abiding by existing rules and regulations. The City prohibits the recording of conversations, phone calls, images or city meetings with any recording device without prior approval. When illegal or inappropriate behavior is engaged in that relates to an employee's job duties or raises doubts as to the employee's ability to carry out the employee's duties, the activity will be reviewed, and appropriate action may be taken up to and including termination. The City of New Berlin's complete policy on the Code of Conduct is available on our intranet.

B. HAZARD COMMUNICATION PROGRAM

In order to provide a safe and hazardous free workplace for its employees, the City of New Berlin complies with the requirements of the Wisconsin Employees' Right to Know Law (Wisconsin State Statutes 101.58 – 101.599), as well as with the requirements of OSHA's Hazard Communications Standard (29 CFR 1910.1200). The Hazard Communications policy is posted on the City's intranet.

C. USE OF CITY VEHICLES

The City of New Berlin provides the use of vehicles necessary for employees to perform their job. These vehicles are to be used solely for City-related business. Any employee assigned a "take-home" vehicle or using a city vehicle during the workday must review the Vehicle Use Policy for further definitions of business vs. personal miles and for the proper mileage reporting requirements.

An employee must obtain permission from their Department Head to use City Vehicles in the course of travel connected with approved training and City business. Any out-of-pocket expenses such as parking, tolls, emergency repairs, and gasoline, shall be reimbursed upon presentation of receipts. Employees can refer to the City's Driver Handbook located on the intranet.

D. USE OF CITY EQUIPMENT INCLUDING INFORMATION TECHNOLOGY

The use of any City equipment, hardware and software is governed by the Network Use policy. All equipment, hardware and software are the exclusive property of the City of New Berlin. The computer network refers to all computer equipment owned by the City including but not limited to network distribution equipment such as switches and routers, computers, printers, laptop computers, cell phones with mobile data access and all associated peripherals. All information and data generated or gathered by a user in the course of his/her employment becomes the property of the City of New Berlin. The Network Use policy governs employee use of these technologies.

Employees should be aware that they cannot send e-mail using City equipment and internet without associating themselves with the City. What employees believe to be a personal statement could very well be attributed to the City and the City may be held responsible for their conduct. E-mail sent from City equipment will not be considered private communication. E-mail transmissions will be monitored from

time to time; returned items may be read in an attempt to route the message to the proper office and/or to determine whether any violations of the City's policies on e-mail use have been or are occurring. It also must be understood that any e-mail document sent or received on City equipment is a public record and thus is available for public inspection at any time. The content of e-mail sent or received, sites visited even while on personal time using City equipment, and computer network must always be reflective of a positive image of the City and in compliance with all City policies. Viewing or transmitting inappropriate or illegal materials will be grounds for disciplinary action up to and including termination. Employees are not to use their own personal computers or laptops to conduct City business unless authorized by the Mayor and the Human Resources Department. Such use under the public records law makes such machines public and all contents and actions available to public scrutiny.

Employees of the City of New Berlin are authorized to use the Internet and the City's computer network, which includes all information accessed by internet sites and email upon approval of the Mayor as communicated through the Department Head or his/her designee as provided in this Policy

For detailed information on appropriate use and enforcement, you can log on to the City's intranet to view the entire policy.

This Employee Handbook was reviewed and approved by Mayor David Ament on the 1st day of May 2025 as evidenced by his signature hereon. Three signed originals of this policy have been generated. One original is maintained in the Mayor's Office, the second original is maintained in the Human Resources Department and the third original is maintained in the City Clerk's Office. An electronic copy will be made available on the Employee Intranet. This Employee Handbook may only be modified with the written approval of the Mayor.

A handwritten signature in black ink, appearing to read "David A. Ament". The signature is fluid and cursive, with a prominent initial "D" and "A".

David A. Ament, Mayor

APPENDIX A – NEW BERLIN FIRE DEPARTMENT BENEFITS FOR EMPLOYEES COVERED UNDER A CBA

INSURANCE FULL-TIME EMPLOYEES

Section 18.01 – Life Insurance:

For full-time employees, the City shall provide, at its sole expense, term life insurance and accidental death and dismemberment coverage in the face amount equal to the next highest \$1,000 over the employee's annual salary.

Section 18.02 – Health Insurance:

Full-time employees shall contribute 15% of the monthly premium toward the cost of health insurance. All employees enrolled in the City's health insurance plan will be afforded the same HSA contributions as the non-represented employees. If an employee has a spouse that is also a City employee, that employee and the employee's spouse will be entitled to only one family health insurance contract between them from the City, or two single plans. The City will fully support keeping IAFF Local 4724 in the same health insurance plan as other general city employees. Full-time employees enrolled in the health insurance plan on January 1, will receive a comp time credit of 18 hours if enrolled in a single plan and 36 hours if enrolled in a family plan.

Section 18.03 – Dental & Vision Benefits

The City will provide Dental and Vision benefits to all eligible employees and their families at the same premium rates as non-represented employees.

Section 18.04 – 125 Plan:

Employees may participate in the City's IRS Section 125 Program to cover any dental, health, or other costs that are recognized under the City's Plan.

Section 18.05 – Long-term Disability Insurance:

This benefit is available to full-time employees and may only be taken when an employee begins employment. Premiums are a joint contribution; half is paid by the employee and half is paid by the City.

Section 18.06 – Health Insurance Opt-out Program:

Full-time employees that are eligible and enrolled in a group health plan through another employer may voluntarily opt-out of the City's health insurance program. The opt-out program shall be offered on an annual basis. Employees shall be allowed to re-enroll in the City's insurance program at open-enrollment time, unless for a qualifying reason, it is necessary to re-enter the program earlier (i.e., spouse loses coverage, divorce, etc.). Employees who voluntarily waive the coverage will receive four hundred dollars (\$400.00) per month in a Dependent Care Reimbursement Account; OR (1) the choice of five thousand dollars (\$5,000.00) per year (in equal monthly installments) placed in a Health Savings Account (HSA) if enrolled in a Family High Deductible Plan (HDHP) or (2) three thousand three hundred dollars (\$3,300.00) per year

(in equal monthly installments) placed in a HSA if enrolled in a Single High Deductible Health Plan).

Section 18.07 – Insurance for Retirees:

Upon retirement of a full-time employee with 15 years of service or more, under the terms of the Wisconsin Retirement System, the City will establish a premium bank to be used for health insurance premium payments on behalf of the employee. The insurance premium bank is developed by multiplying an employee's unused sick leave hours at the time of retirement by his/her hourly rate multiplied by 50%.

Money from the insurance premium bank may only be used for health insurance premiums for health insurance plan offered by the City.

Section 18.08 – Post Employment Health Plan (PEHP):

The City will establish a PEHP program that will become effective December 31, 2011, to include the follow parameters:

1. All part-time employees after 3 years of service shall have 1% of their earnings deposited into the PEHP program.
2. Newly hired full-time employees after successful completion of their probationary period shall have 1% of their earnings deposited into the PEHP program.
3. Part -time employees, who are already enrolled in the PEHP program and who are promoted to full-time employment, shall continue in the PEHP program without first having to successfully complete their probationary period.

APPENDIX B – NEW BERLIN POLICE DEPARTMENT BENEFITS FOR EMPLOYEES COVERED UNDER A CBA

INSURANCE FULL-TIME EMPLOYEES

Section 5.01 - Life Insurance: The City shall provide as a one-time annual salary, at its sole expense, term life insurance on the lives of Officers, with double indemnity for accidental death. The City shall allow employees the option of selecting dependent life insurance as provided for by the life insurance company. The employee is responsible for the entire premium for this coverage.

Section 5.02 - Health Insurance: Employees may select single or family health insurance coverage. Employees shall contribute fifteen percent (15%) of the monthly premium, through the Section 125 program with the balance to be paid by the City. All employees enrolled in the City's health insurance plan will be afforded the same HSA contributions as the non-represented employees

In the event an employee has a spouse that is also a City employee, that employee and the employee's spouse will be entitled to only one family health insurance contract or two single contracts between them from the City.

Section 5.03 - Insurance for Duty Related Disability Retirees: Employees who retire under the provisions of Wisconsin Statutes Section 40.65 shall be covered by the City's health insurance plan. Retirees under this section may select single or family health insurance coverage and shall contribute the same percentage of the monthly premium as is required of active employees with the balance to be paid by the City.

This benefit shall cover eligible spouse and dependents at the time of retirement. The retiree will remain eligible for this benefit until:

- a) the retiree becomes eligible for Medicare, or
- b) the retiree is eligible for fully paid insurance through another employer or through his/her spouse's employer.

Section 5.04 - Insurance for Non-Duty Related Disability Retirees: Employees retiring under the provisions of Wisconsin Statutes Section 40.63 will be covered under the retiree health insurance fund program provided for in Section 5.06 and have all or part of their health insurance premiums paid from the retiree health insurance fund pursuant to the terms and conditions therein. Any portion of the premium not covered by the trust shall be calculated with the retiree paying the same percentage of the monthly premium as is required of active employees with the balance to be paid by the City.

This benefit shall cover eligible spouse and dependents at the time of retirement. The retiree will remain eligible for this benefit until:

- a) the retiree becomes eligible for Medicare, or
- b) the retiree is eligible for fully paid insurance through another employer or through his/her spouse's employer.

Section 5.05 - 125 Plan: Employees may participate in the City's IRS Section 125 Program to cover any dental, health, or other costs that are recognized under the City's Plan.

Section 5.06 - Retiree Health Insurance Fund: Current employees with fifteen (15) or more years of continuous service with the City who retire under the Wisconsin Retirement System shall be allowed to participate in the same health care plan for active employees working for the City and have all or part of

their health insurance premiums paid from the New Berlin Police retiree health Care Subsidy Plan and Trust (herein after referred to as the Trust) in accordance with the Trust document entered into between the City and the Association.

- 1) On January 2, 2021, the City shall pay to the Trust \$86,693 as a general contribution. On January 2 of each year after 2021, the City shall pay to the Trust the same amount as the previous year, plus an additional one and one half percent (1.5%).
- 2) Retirees who receive a health care premium subsidy from the Trust, who still owe a balance on their monthly premium will pay that balance from their accumulated sick time conversion money, in accordance with Article VI of this Agreement, until that money is exhausted, at which time any unpaid portion of their health insurance premium will be paid directly to the City by the retiree by the 20th of the month preceding the month in which coverage is desired.
- 3) Retirees who have any money left in their sick leave conversion at the time they become eligible for Medicare shall be allowed to use the sick leave conversion money towards Medicare supplement insurance as chosen by the City.

If an eligible employee with twenty (20) or more years of continuous service separates employment from the City prior to retirement under the Wisconsin Retirement System, the employee may maintain eligibility by paying \$1,500 per year to the Trust by February 15 of that year, until the retiree begins to draw upon their WRS funds.

Section 5.07- Health Insurance/Dependents: An officer who dies in the line of duty and at the time of death is participating in the health insurance plan offered by the City shall have the same insurance program offered to the spouse of the deceased employee. The spouse and eligible dependents shall be allowed to remain in the health insurance plan for a minimum of sixty (60) months provided that the premiums are paid to the City in a timely manner. This provision shall also apply to the spouse and eligible dependents who lose coverage due to a retiree becoming eligible for Medicare and losing coverage in accordance with Sections 5.03 and 5.04.

Section 5.08- Health Insurance Opt-out Program: Employees that are eligible and enrolled in a group health plan through another employer may voluntarily opt-out of the City's health insurance program. The opt-out program shall be offered on an annual basis. Employees shall be allowed to re-enroll in the City's insurance program at open-enrollment time, unless for a qualifying reason, it is necessary to re-enter the program earlier (i.e. spouse loses coverage, divorce, etc.). Employees who voluntarily waive the coverage will receive four hundred dollars (\$400.00) per month in a Dependent Care Reimbursement Account OR the choice of \$5,000.00 per year (in equal monthly installments) placed in a Health Savings Account if enrolled in a Family High Deductible Health Plan (HDHP) or \$3,300.00 per year (in equal monthly installments) placed in a Health Savings Account if enrolled in a Single High Deductible Health Plan (HDHP). Should the City provide an opt-out payment to non-represented employees, in either category, which is greater, Officers shall receive the higher opt-out benefit payment.

Section 5.09 – Dental & Vision Benefits: The City will provide Dental and Vision benefits to all eligible employees and their families at the same premium rates as non-represented employees.

Acknowledgement of City of New Berlin Employee Handbook, Appendices, Policies and Procedures

I, _____ (printed Employee Name) acknowledge I am responsible for reading, understanding, and complying with the City of New Berlin Employee Handbook and applicable Standard Operating Procedures. An electronic version of the City of New Berlin Employee Handbook and any Appendices can be found on the City’s Employee Intranet website: <https://www.newberlin.org/72/Welcome-to-the-Employee-Intranet> and in the document center on the Employee Self-Service site. I am also responsible for reading, understanding, and complying with the City of New Berlin Policies and Procedures which can be found on the City’s Employee Intranet website, including but not limited to the following:

- Anti-Harassment, Discrimination, Retaliation & Bullying Policy
- DOT and Non-DOT Regulated Alcohol Misuse Prevention & Anti-Drug Policy
- Code of Conduct Policy
- Social Media Policy
- Media Relations Policy
- Network Use Policy
- Procurement Policy
- AED Policy
- Field Safety Manual

Additionally, I acknowledge that the information in this Handbook and any Appendices is subject to change from time to time and may be changed unilaterally by the City. I understand that changes in the City of New Berlin Policies and Procedures may supersede, modify, or eliminate the information summarized in this Handbook if they are modified by the City. As the City provides updated policy and procedure information, I accept responsibility for reading and abiding by the changes.

Employee Signature

Date

Print Name

A newly revised City of New Berlin Employee Handbook is available online to all employees on the Employee Self Service site or the Employee Intranet.