

Committee of the Whole Meeting Agenda



July 28, 2026 - 6:00 PM
New Berlin City Hall Council Chambers
3805 S. Casper Drive

Amended & Published: 7/27/2026 @ 2:48 PM

Published: 7/27/2026

AGENDA

1. **CALL MEETING TO ORDER**
2. **ROLL CALL; DECLARATION OF QUORUM; PUBLIC NOTICE**
3. **APPROVAL OF MINUTES**
 - A. June 23, 2026, Committee of the Whole Meeting Minutes
4. **UTILITY & FINANCE**
 - A. Discussion and possible recommendation to the Common Council to approve the July 15, 2026, Water Utility claims in the amount of \$287,513.85, Sewer Utility claims in the amount of \$797,810.05, and General City claims in the amount of \$1,140,826.43, including a We Energies EFT payment of \$71,001.85, a US Bank VISA EFT payment of \$27,100.63, and a General City check dated June 26, 2026, in the amount of \$4,250.00.
5. **LICENSES & PERMITS**
 - A. Discussion and possible recommendation to the Common Council to approve a Change of Agent for Kwik Trip #977, located at 15075 W. National Ave, from Mario F. Baregi to Justin R. Perez for the licensing period ending June 30, 2027, per the application on file.
 - B. Discussion and possible action to recommend to the Common Council approval of Kowalske Brewing, doing business as Component Brewing, to sell beer at the New Berlin Historical Society on September 13, 2026, from 1:00 p.m. to 5:00 p.m., at the New Berlin Public Library on September 18, 2026, from 4:00 p.m. to 8:00 p.m., and at the New Berlin Historical Society on October 11, 2026, from 1:00 p.m. to 5:00 p.m., as outlined in Form AB-105. The applications, along with the Council's recommendation, will be forwarded to the Wisconsin Department of Revenue, Division of Alcohol Beverages, for final approval and issuance.
6. **MISCELLANEOUS**
 - A. Discussion and possible recommendation to the Common Council to formally approve the appointment of Matthew Uselding as Finance Director for the City of New Berlin.
 - B. Human Resources Department Update
 - C. Finance Department Update
 - D. Discussion and possible recommendation to the Common Council to approve Resolution No. 2026-13, a Resolution Providing for the Sale of Approximately \$10,130,000 General Obligation Promissory Notes, Series 2026A

- E. Discussion and possible recommendation to the Common Council to approve Resolution No. 2026-12, a Resolution Amending the 2026 Capital Projects Budget, to transfer \$48,491 from the Lions Park Pickleball Court Design project to the Gatewood Park Master Plan project.
- F. Discussion and possible recommendation to the Common Council to approve a part-time Recreation Event Support staff position to fulfill the contractual obligations of events scheduled at Hickory Grove and the ARC as outlined in the New Berlin Recreation Court Rental Rates, Policies and Procedures.

7. 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.



Committee of the Whole MEETING MINUTES

June 23, 2026 - 6:00 PM
Council Chambers
3805 S. Casper Drive

MINUTES

1. CALL MEETING TO ORDER

Mayor Ament called the meeting to order at 6:02 PM

2. ROLL CALL; DECLARATION OF QUORUM; PUBLIC NOTICE

City Clerk Rubina R. Medina took the roll call as follows:

Present: Alderperson Hopkins, Alderperson Maxey, Alderperson Harenda, Alderperson Horbinski, Alderperson Kroupa, Commissioner Gardner

Excused: Alderperson Joseph Stribl

Staff Present: Mayor Dave Ament, City Attorney Mark Blum, City Clerk Rubina R. Medina

The City Clerk confirmed that a quorum was present and that the meeting was properly posted in compliance with open meetings law.

3. APPROVAL OF MINUTES

A. June 9, 2026, Committee of the Whole Meeting Minutes

MOTION: Motion to Approve

VOTE: Motion by: Alderperson Horbinski
Second by: Alderperson Kroupa
Motion Passed 6-0

4. UTILITY & FINANCE

A. Discussion and possible recommendation to the Common Council to approve the June 24, 2026, Water Utility claims in the amount of \$13,075.07, Sewer Utility claims in the amount of \$21,044.62, and General City claims in the amount of \$905,352.01, including a General City Claims prepay batch of \$80,632.12 dated for June 11, 2026.

MOTION: Motion to Approve

VOTE: Motion by: Alderperson Harenda
Second by: Commissioner Gardner

5. LICENSES & PERMITS

- A.** Discussion and possible recommendation to the Common Council to approve the renewal alcohol licenses, designated agents, and premise descriptions as outlined in the list as presented, for the license year expiring June 30, 2027, contingent upon the satisfaction of all City requirements

MOTION: Motion to Approve

VOTE: Motion by: Alderperson Kroupa
Second by: Alderperson Hopkins
Motion Passed 6-0

6. MISCELLANEOUS

- A.** Introduction of Steven Linn, City of New Berlin Communications Manager

Mayor Ament introduced the Common Council and those in attendance to Steven Linn, the City of New Berlin's new Public Communications Manager. Mr. Linn came to the podium to introduce himself, provide a brief overview of his professional background, and discuss several of the projects he is currently working on.

- B.** New Berlin Public Library Update

Natalie Beacom gave her department an update.

- C.** Stormwater Management Presentation

Kristi Heuser, Program Manager with the Root-Pike Watershed Initiative Network gave a presentation to the Council and those in attendance.

- D.** Discussion and possible recommendation to the Common Council to approve a contract with Fearing's Audio and Security in the amount of \$46,550.92 for the Malone Park audio project, subject to review and approval by the Mayor and City Attorney.

MOTION: Motion to Approve

VOTE: Motion by: Alderperson Harenda
Second by: Alderperson Horbinski
Motion Passed 6-0

7. ADJOURN

MOTION: Motion to Adjourn at 6:41 PM

VOTE: Motion by: Alderperson Kroupa
Second by: Commissioner Gardner
Motion Passed 6-0

**Respectfully Submitted,
Rubina R. Medina, City Clerk**

Part A: Producer Information

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

2. Business Name or DBA

3. Agent Name

4. FEIN

5. Wisconsin Seller's Permit Number

6. Wisconsin Producer Permit Number

7. Producer Type

☐ Brewery ☐ Winery ☐ Liquor Manufacturer/Rectifier

8. Contact Person's First Name

9. Last Name

10. M.I.

11. Contact Person's Phone

12. Contact Person's Email

Part B: Production Quantity

Note: Check appropriate quantity for permit held (see instructions). If you hold more than one producer permit, check the total aggregate quantity produced for each type of permit. Enter the highest quantity produced in any of the last three calendar years.

Brewery

- ☐ Less than 250 barrels
☐ 250 - 2,499 barrels
☐ 2,500 - 7,499 barrels
☐ 7,500 or more barrels

Manufacturer/Rectifier

- ☐ Less than 1,500 liters
☐ 1,500 - 4,999 liters
☐ 5,000 - 34,999 liters
☐ 35,000 or more liters

Winery

- ☐ Less than 1,000 gallons
☐ 1,000 - 4,999 gallons
☐ 5,000 - 24,999 gallons
☐ 25,000 or more gallons

Calendar year:

Calendar year:

Calendar year:

Quantity:

Quantity:

Quantity:

Complete only ONE of Part C, D or E.**Part C: Request for Full-Service Retail Sales at the Production Premises**

1. Start Date

2. Production Premises Address

3. City

4. State

5. Zip Code

6. County

7. Governing Municipality ☐ City ☐ Town ☐ Village
of: _____**Part D: Request for Fixed Full-Service Retail Outlet**1. Are you transferring one fixed full-service retail outlet to a new location? ☐ Yes ☐ No
If yes, complete boxes 2 through 9.

2. Current Outlet Name

3. Current Outlet Premises Address

4. City

5. State

6. Zip Code

7. County

8. Governing Municipality ☐ City ☐ Town ☐ Village
of: _____

9. Premises Phone Number

Continued →

Part D: Request for Fixed Full-Service Retail Outlet (Cont.)**New Fixed Retail Outlet Information (complete boxes 10 through 23)**

10. Start Date	11. New Outlet Name		
12. New Outlet Premises Address			
13. City		14. State	15. Zip Code
16. County	17. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		18. Premises Phone Number
19. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.			
20. Will you operate a restaurant on the premises? ☐ Yes ☐ No			
21. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
22. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
23. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption			

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

1. Name of Event (if applicable)		
2. Dates of Operation (attach a schedule, if necessary)		3. Hours of Operation
4. Premises Address		
5. City		6. State 7. Zip Code
8. County		9. Governing Municipality ☐ City ☐ Town ☐ Village of: _____
10. Organizer of Event (if not the named applicant)		11. Email and/or Phone Number for Organizer of Event
12. Organizer Website		13. Event Website
14. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.		
15. On-Site Contact (Last Name, First Name)	16. On-Site Contact Phone	17. On-Site Contact Email
18. Will you operate a restaurant on the premises? ☐ Yes ☐ No		
19. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
20. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
21. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption		

Part F: Attestation

Who must sign this application?

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

READ CAREFULLY BEFORE SIGNING:

I understand and agree to the following:

- I will not operate this location outside of the dates and times approved by the municipality and Division of Alcohol Beverages.
- I will operate this location according to municipal ordinance and restrictions imposed as a condition of receiving this authorization.
- I will purchase alcohol beverages I do not produce from an authorized source, such as a Wisconsin-permitted wholesaler.
- I will operate this location according to Wisconsin law and administrative regulation including but not limited to: underage restrictions, closing hours, licensed operators, and record keeping requirements.

Further, under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the authorization. Further, I agree that the rights and responsibilities conferred by the authorization, if granted, will not be assigned to another individual or entity. I understand that lack of access to any portion of a premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this authorization. I understand that any authorization issued contrary to Wis. Stats. Chapter 125 shall be void under penalty of Wisconsin law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

Signature

David E. Kowalske

Date

Last Name

First Name

M.I.

Title

Email

Phone

Part G: For Municipal Use Only (Complete if Requesting Authorization in Part D or E)1. Will the municipality limit the scope of alcohol beverages offered for sale? ☐ Yes ☐ No2. Will the municipality impose any requirements or restrictions for the full-service retail outlet? ☐ Yes ☐ No

3. Describe municipal restrictions indicated in questions 1 or 2 above.

4. Last Name of Municipal Official

5. First Name

6. M.I.

7. Signature of Municipal Official

8. Date

9. Date Application was Filed with Clerk

10. Date Full-Service Retail Outlet Approved by Governing Body

Form AB-105 Instructions

Producer Full-Service Retail Sales Application

Who may apply for full-service retail sales?

Producer permittees may apply for full-service retail sales on or off the production premises. Producer permittees include brewers, rectifiers, manufacturers, and wineries.

Who qualifies for full-service retail sales?

- A brewery that manufactures a minimum of 250 barrels of fermented malt beverages.
- A manufacturer/rectifier that produces a minimum of 1,500 liters of intoxicating liquor.
- A winery that produces a minimum of 1,000 gallons of wine.

What are full-service retail sales?

Permittees that are granted full-service retail sales privileges may:

- Sell fermented malt beverages and intoxicating liquor at retail for on- or off-premises consumption at their production premises and at one or more off-site full-service retail outlets.
- Provide taste samples of fermented malt beverages and intoxicating liquor.

What are full-service retail outlets?

Full-service retail outlets are authorized locations for full-service retail sales at places other than the permittee's production premises.

What is the difference between a fixed and unlimited transfer full-service retail outlet?

Fixed full-service retail outlets may be transferred from one location to another once per year. Unlimited transfer full-service retail outlets may be transferred an unlimited number of times in a year. Only one of a producer's full-service retail outlets may be transferred without limitation on frequency.

How many full-service retail outlets may I have?

The number of full-service retail outlets a producer qualifies for is determined by alcohol beverage production volume. Producers may have a maximum of three full-service outlets, regardless of the number or type of producer permits they hold.

Who approves full-service retail sales?

Full-service retail sales on the production premises need only be approved by the Division of Alcohol Beverages. Municipalities do not issue licenses for full-service retail sales outlets; however, municipalities must approve of the outlets. The applicant must forward the municipal approval to the Division of Alcohol Beverages for final granting of the authority for sales to commence on the premises.

Can a municipality limit authorized sales at a full-service retail outlet?

Yes, a municipality can limit authorized sales at a full-service retail outlet. Municipalities may limit the scope of alcohol beverages offered for sale by the permittee. Municipal approval of a full-service retail outlet must be based on the same standards and criteria, established by ordinance, for the evaluation and approval of retail licenses. A municipality may not impose any requirement or restriction in connection with the approval that the municipality does not impose on retail licensees.

How do I fill out Form AB-105 and begin the application process?

Authorizations requested on Form AB-105 must be applied for only one premises in one municipality at a time. To request multiple authorizations, submit a separate Form AB-105 for each location/premises.

Parts A, B, and F: Applicants must complete Parts A, B, and F.

Parts C, D, and E: Complete only one Part. Form AB-105 must be used to request only one authorization at a time.

Example: A producer applicant requesting full-service retail sales authorization on the production premises should complete Parts A, B, C, and F.

Example: A producer applicant requesting a fixed full-service retail outlet should complete Parts A, B, D, and F.

Example: A producer applicant requesting an unlimited transfer full-service retail outlet should complete Parts A, B, E, and F. Producer applicants requesting authorization in Part E must complete one Form AB-105 for each premises. Applicants may use the same Form AB-105 to request authorization for multiple dates and times occurring on the same premises.

Municipal approval is required for authorizations requested in Parts D and E. If a producer is applying for authorization in either of these sections, the completed application must first be submitted to the governing municipality.

After the municipality has granted approval by completing Part G, the applicant should submit AB-105 to the Division of Alcohol Beverages for final approval. If the applicant is only requesting authorization in Part C, the application does not require municipal approval and may be submitted directly to the Division of Alcohol Beverages.

Specific Instructions:

Part A: Producer Information

- Box 1: Enter the legal business name.
- Box 2: Enter the trade name or “doing business as” name, if different than the name in box 1.
- Box 3: Enter the name of the approved agent appointed for your producer permit.
- Box 4: Enter Federal Employer Identification Number (FEIN).
- Box 5: Enter Wisconsin seller’s permit number.
- Box 6: Enter the 15-digit Wisconsin Tax Account Number of the permit that these authorizations should be associated with.
- Box 7: Check the corresponding producer permit type.
- Box 8-10: Enter contact person’s name.
- Box 11: Enter contact person’s phone number.
- Box 12: Enter contact person’s email address.

Part B: Production Quantity

- Check the highest cumulative total of alcohol beverages produced in any one of the three preceding calendar years for each specific permit type held.
 - Do not include alcohol beverages produced under a contract production agreement.
- Enter the calendar year in which the highest cumulative total of alcohol beverages produced was met.
- Enter the exact quantity of alcohol beverages produced.
- If an applicant holds more than one type of permit or multiple permits of the same type, the aggregate number of full-service retail outlets that may be established is the maximum number authorized under their permit type, but not exceeding three full-service retail outlets.
 - Under these circumstances, each authorized full-service retail outlet shall serve as the full-service retail outlet associated with each applicable permit, regardless of whether permittee would otherwise be entitled to fewer full-service retail outlets when calculated under their other permit(s).

Part C: Request for Full-Service Retail Sales at the Production Premises

- Authorization under this portion does not require municipal approval. If the applicant is not seeking other retail authorizations on this form, it can be submitted directly to the Division of Alcohol Beverages.
- Box 1: Enter the date that you would like to begin full-service retail sales.
- Box 2-5: List the premises address for the permit identified in Part A, boxes 5 and 6.
- Box 6: Name the county where the production premises is located.
- Box 7: Name the governing municipality where the production premises is located.

Part D: Request for Fixed Full-Service Retail Outlet

- Authorization under this section must be approved by the municipality in which the retail outlet is located prior to submitting to the Division of Alcohol Beverages for final approval.
- Box 1: Check yes if you are applying to transfer a fixed full-service outlet from one location to another. Fixed Full-Service Retail Outlets may be transferred from place-to-place once per year with approval of the municipality that governs the new location.
- Boxes 2-9: Complete these boxes if you checked yes in box 1 to describe the current premises you are applying to transfer.

- Box 10: Enter the date that you would like to open the full-service retail outlet for business.
- Boxes 11-18: Complete these boxes to describe the location of your new premises.
- Box 19: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI 12345 and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000-square-foot building.

- Box 20: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and division approval.
- Box 21: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer or producer group.
- Box 22: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 23: Check all types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 18.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume away from the premises identified in Box 18.

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

- Authorizations under Part E must be for dates of operation where the unlimited transfer location will be located at the same premises in the same municipality. You must use a new Form AB-105 to request authorization for each separate premises, regardless of whether the separate premises are in the same municipality.
- Box 1: If you are requesting authorization to initiate or move your unlimited transfer outlet to a specific event like a farmer's market, festival, or other community event, name it here.
- Box 2: List the requested dates of operation. Attach a schedule or calendar of events, if necessary.
- Box 3: List the requested hours of operation. If no hours are listed, the approving municipality and the Division will assume you are seeking authorization to operate during all hours allowed under Chapter 125, Wis. Stats.
- Box 4-9: Identify the premises address.
- Box 10-13: If you are requesting authorization to move your unlimited transfer outlet to a specific event, provide contact information for the event organizer, if not the named applicant.
- Box 14: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI, 12345, and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000 square foot building.

Example: The premises is the 1,000-square-foot tent within the southwest corner of the parking lot located at XYZ Church at 3456 Main St., Realtown, WI, 12345. All sales and storage of alcohol beverages and records will occur within the 1,000-square-foot tent in the southwest corner of the parking lot.

Example: The premises is located at PDQ Park (7890 Main St., Realtown, WI, 12345). A 5,000-square-foot tent will be constructed in the northeast corner of the park bordering the tree line and northern fence. All alcohol beverage sales and consumption will occur at this tent. Premises includes the adjacent north park office and the space between the tent and the office. Alcohol beverages and records will be securely stored in the north park office for the duration of the event.

- Box 15-17: Provide the name and contact information for a person who will be in control of the premises for the duration of the requested time.
- Box 18: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and Division of Alcohol Beverages approval.
- Box 19: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer under all their permits.
- Box 20: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 21: Check all the types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 14.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume

away from the premises identified in Box 14.

Part F: Attestation

- Read the attestation carefully, then sign and date.

Part G: For Municipal Use Only

- Box 1: Check yes or no to indicate if the municipality will limit the scope of alcohol beverages offered for sale at this full-service retail outlet.
- Box 2: Check yes or no to indicate if the municipality will impose other requirements or restrictions on the full-service retail outlet.
- Box 3: Describe any limitations the municipality has placed on the full-service retail outlet as indicated in questions 1 or 2. Some limitations may be: parking, zoning, or noise ordinance restrictions; not allowing sales of alcohol beverages for off-premises consumption.
- Box 4-10: The municipal official completing this part should fill in the information requested.

Completion and Submission of Form AB-105

- The producer applicant should complete Parts A, B, and F completely, and either Part C, D, or E, depending on the type of authorization requested.
- If requesting only a Part C authorization, the application can be submitted directly to the Division of Alcohol Beverages. No municipal approval is required for Part C authorizations.
- If requesting a Part D or E authorization, provide the application to the municipality where the proposed full-service retail outlet will be located.
 - The municipality should complete Part G and return it to the producer applicant.
 - The producer applicant should provide the completed AB-105 to the Division of Alcohol Beverages for final approval.
- Sales of alcohol beverages at full-service retail outlets may not commence until the Division of Alcohol Beverages has provided final approval by way of issuing a printed authorization to the applicant to be posted at the retail premises identified in this application.

After Form AB-105 is completed by the producer and approved by the municipality in Part G, submit the form to the Division of Alcohol Beverages for final approval in one of two ways:

- Email: DORAlcoholPermits@wisconsin.gov
- Mail the form to the following address:

Wisconsin Department of Revenue
Division of Alcohol Beverages
P.O. Box 8934
Madison, WI 53708-8934

Assistance

This form is designed by the Department of Revenue. If you require assistance with this form, consider reaching out to the Division of Alcohol Beverages for assistance with submission of this application and associated forms.

If you have questions about alcohol beverage laws and regulations, you may contact the Division of Alcohol Beverages using the contact information below.

Website: [DOR Alcohol Beverage \(wi.gov\)](http://DORAlcoholBeverage.wi.gov)

Write: DORAlcohol@wisconsin.gov

Call: (608) 264-4573

Part A: Producer Information

1. Business Legal Name (individual name if sole proprietor)		
2. Business Name or DBA	3. Agent Name	
4. FEIN	5. Wisconsin Seller's Permit Number	
6. Wisconsin Producer Permit Number	7. Producer Type ☐ Brewery ☐ Winery ☐ Liquor Manufacturer/Rectifier	
8. Contact Person's First Name	9. Last Name	10. M.I.
11. Contact Person's Phone	12. Contact Person's Email	

Part B: Production Quantity

Note: Check appropriate quantity for permit held (see instructions). If you hold more than one producer permit, check the total aggregate quantity produced for each type of permit. Enter the highest quantity produced in any of the last three calendar years.

Brewery	Manufacturer/Rectifier	Winery
☐ Less than 250 barrels ☐ 250 - 2,499 barrels ☐ 2,500 - 7,499 barrels ☐ 7,500 or more barrels	☐ Less than 1,500 liters ☐ 1,500 - 4,999 liters ☐ 5,000 - 34,999 liters ☐ 35,000 or more liters	☐ Less than 1,000 gallons ☐ 1,000 - 4,999 gallons ☐ 5,000 - 24,999 gallons ☐ 25,000 or more gallons
Calendar year:	Calendar year:	Calendar year:
Quantity:	Quantity:	Quantity:

Complete only ONE of Part C, D or E.**Part C: Request for Full-Service Retail Sales at the Production Premises**

1. Start Date	2. Production Premises Address		
3. City	4. State	5. Zip Code	
6. County	7. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		

Part D: Request for Fixed Full-Service Retail Outlet

1. Are you transferring one fixed full-service retail outlet to a new location? ☐ Yes ☐ No If yes, complete boxes 2 through 9.			
2. Current Outlet Name			
3. Current Outlet Premises Address			
4. City	5. State	6. Zip Code	
7. County	8. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		9. Premises Phone Number

Continued →

Part D: Request for Fixed Full-Service Retail Outlet (Cont.)**New Fixed Retail Outlet Information (complete boxes 10 through 23)**

10. Start Date	11. New Outlet Name		
12. New Outlet Premises Address			
13. City	14. State	15. Zip Code	
16. County	17. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		18. Premises Phone Number
19. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.			
20. Will you operate a restaurant on the premises? ☐ Yes ☐ No			
21. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
22. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
23. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption			

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

1. Name of Event (if applicable)		
2. Dates of Operation (attach a schedule, if necessary)	3. Hours of Operation	
4. Premises Address		
5. City	6. State	7. Zip Code
8. County	9. Governing Municipality ☐ City ☐ Town ☐ Village of: _____	
10. Organizer of Event (if not the named applicant)	11. Email and/or Phone Number for Organizer of Event	
12. Organizer Website	13. Event Website	
14. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.		
15. On-Site Contact (Last Name, First Name)	16. On-Site Contact Phone	17. On-Site Contact Email
18. Will you operate a restaurant on the premises? ☐ Yes ☐ No		
19. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
20. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
21. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption		

Part F: Attestation

Who must sign this application?

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

READ CAREFULLY BEFORE SIGNING:

I understand and agree to the following:

- I will not operate this location outside of the dates and times approved by the municipality and Division of Alcohol Beverages.
- I will operate this location according to municipal ordinance and restrictions imposed as a condition of receiving this authorization.
- I will purchase alcohol beverages I do not produce from an authorized source, such as a Wisconsin-permitted wholesaler.
- I will operate this location according to Wisconsin law and administrative regulation including but not limited to: underage restrictions, closing hours, licensed operators, and record keeping requirements.

Further, under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the authorization. Further, I agree that the rights and responsibilities conferred by the authorization, if granted, will not be assigned to another individual or entity. I understand that lack of access to any portion of a premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this authorization. I understand that any authorization issued contrary to Wis. Stats. Chapter 125 shall be void under penalty of Wisconsin law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

Signature

David E. Kowalske

Date

Last Name

First Name

M.I.

Title

Email

Phone

Part G: For Municipal Use Only (Complete if Requesting Authorization in Part D or E)1. Will the municipality limit the scope of alcohol beverages offered for sale? ☐ Yes ☐ No2. Will the municipality impose any requirements or restrictions for the full-service retail outlet? ☐ Yes ☐ No

3. Describe municipal restrictions indicated in questions 1 or 2 above.

4. Last Name of Municipal Official

5. First Name

6. M.I.

7. Signature of Municipal Official

8. Date

9. Date Application was Filed with Clerk

10. Date Full-Service Retail Outlet Approved by Governing Body

Form AB-105 Instructions

Producer Full-Service Retail Sales Application

Who may apply for full-service retail sales?

Producer permittees may apply for full-service retail sales on or off the production premises. Producer permittees include brewers, rectifiers, manufacturers, and wineries.

Who qualifies for full-service retail sales?

- A brewery that manufactures a minimum of 250 barrels of fermented malt beverages.
- A manufacturer/rectifier that produces a minimum of 1,500 liters of intoxicating liquor.
- A winery that produces a minimum of 1,000 gallons of wine.

What are full-service retail sales?

Permittees that are granted full-service retail sales privileges may:

- Sell fermented malt beverages and intoxicating liquor at retail for on- or off-premises consumption at their production premises and at one or more off-site full-service retail outlets.
- Provide taste samples of fermented malt beverages and intoxicating liquor.

What are full-service retail outlets?

Full-service retail outlets are authorized locations for full-service retail sales at places other than the permittee's production premises.

What is the difference between a fixed and unlimited transfer full-service retail outlet?

Fixed full-service retail outlets may be transferred from one location to another once per year. Unlimited transfer full-service retail outlets may be transferred an unlimited number of times in a year. Only one of a producer's full-service retail outlets may be transferred without limitation on frequency.

How many full-service retail outlets may I have?

The number of full-service retail outlets a producer qualifies for is determined by alcohol beverage production volume. Producers may have a maximum of three full-service outlets, regardless of the number or type of producer permits they hold.

Who approves full-service retail sales?

Full-service retail sales on the production premises need only be approved by the Division of Alcohol Beverages. Municipalities do not issue licenses for full-service retail sales outlets; however, municipalities must approve of the outlets. The applicant must forward the municipal approval to the Division of Alcohol Beverages for final granting of the authority for sales to commence on the premises.

Can a municipality limit authorized sales at a full-service retail outlet?

Yes, a municipality can limit authorized sales at a full-service retail outlet. Municipalities may limit the scope of alcohol beverages offered for sale by the permittee. Municipal approval of a full-service retail outlet must be based on the same standards and criteria, established by ordinance, for the evaluation and approval of retail licenses. A municipality may not impose any requirement or restriction in connection with the approval that the municipality does not impose on retail licensees.

How do I fill out Form AB-105 and begin the application process?

Authorizations requested on Form AB-105 must be applied for only one premises in one municipality at a time. To request multiple authorizations, submit a separate Form AB-105 for each location/premises.

Parts A, B, and F: Applicants must complete Parts A, B, and F.

Parts C, D, and E: Complete only one Part. Form AB-105 must be used to request only one authorization at a time.

Example: A producer applicant requesting full-service retail sales authorization on the production premises should complete Parts A, B, C, and F.

Example: A producer applicant requesting a fixed full-service retail outlet should complete Parts A, B, D, and F.

Example: A producer applicant requesting an unlimited transfer full-service retail outlet should complete Parts A, B, E, and F. Producer applicants requesting authorization in Part E must complete one Form AB-105 for each premises. Applicants may use the same Form AB-105 to request authorization for multiple dates and times occurring on the same premises.

Municipal approval is required for authorizations requested in Parts D and E. If a producer is applying for authorization in either of these sections, the completed application must first be submitted to the governing municipality.

After the municipality has granted approval by completing Part G, the applicant should submit AB-105 to the Division of Alcohol Beverages for final approval. If the applicant is only requesting authorization in Part C, the application does not require municipal approval and may be submitted directly to the Division of Alcohol Beverages.

Specific Instructions:

Part A: Producer Information

- Box 1: Enter the legal business name.
- Box 2: Enter the trade name or “doing business as” name, if different than the name in box 1.
- Box 3: Enter the name of the approved agent appointed for your producer permit.
- Box 4: Enter Federal Employer Identification Number (FEIN).
- Box 5: Enter Wisconsin seller’s permit number.
- Box 6: Enter the 15-digit Wisconsin Tax Account Number of the permit that these authorizations should be associated with.
- Box 7: Check the corresponding producer permit type.
- Box 8-10: Enter contact person’s name.
- Box 11: Enter contact person’s phone number.
- Box 12: Enter contact person’s email address.

Part B: Production Quantity

- Check the highest cumulative total of alcohol beverages produced in any one of the three preceding calendar years for each specific permit type held.
 - Do not include alcohol beverages produced under a contract production agreement.
- Enter the calendar year in which the highest cumulative total of alcohol beverages produced was met.
- Enter the exact quantity of alcohol beverages produced.
- If an applicant holds more than one type of permit or multiple permits of the same type, the aggregate number of full-service retail outlets that may be established is the maximum number authorized under their permit type, but not exceeding three full-service retail outlets.
 - Under these circumstances, each authorized full-service retail outlet shall serve as the full-service retail outlet associated with each applicable permit, regardless of whether permittee would otherwise be entitled to fewer full-service retail outlets when calculated under their other permit(s).

Part C: Request for Full-Service Retail Sales at the Production Premises

- Authorization under this portion does not require municipal approval. If the applicant is not seeking other retail authorizations on this form, it can be submitted directly to the Division of Alcohol Beverages.
- Box 1: Enter the date that you would like to begin full-service retail sales.
- Box 2-5: List the premises address for the permit identified in Part A, boxes 5 and 6.
- Box 6: Name the county where the production premises is located.
- Box 7: Name the governing municipality where the production premises is located.

Part D: Request for Fixed Full-Service Retail Outlet

- Authorization under this section must be approved by the municipality in which the retail outlet is located prior to submitting to the Division of Alcohol Beverages for final approval.
- Box 1: Check yes if you are applying to transfer a fixed full-service outlet from one location to another. Fixed Full-Service Retail Outlets may be transferred from place-to-place once per year with approval of the municipality that governs the new location.
- Boxes 2-9: Complete these boxes if you checked yes in box 1 to describe the current premises you are applying to transfer.

- Box 10: Enter the date that you would like to open the full-service retail outlet for business.
- Boxes 11-18: Complete these boxes to describe the location of your new premises.
- Box 19: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI 12345 and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000-square-foot building.

- Box 20: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and division approval.
- Box 21: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer or producer group.
- Box 22: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 23: Check all types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 18.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume away from the premises identified in Box 18.

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

- Authorizations under Part E must be for dates of operation where the unlimited transfer location will be located at the same premises in the same municipality. You must use a new Form AB-105 to request authorization for each separate premises, regardless of whether the separate premises are in the same municipality.
- Box 1: If you are requesting authorization to initiate or move your unlimited transfer outlet to a specific event like a farmer's market, festival, or other community event, name it here.
- Box 2: List the requested dates of operation. Attach a schedule or calendar of events, if necessary.
- Box 3: List the requested hours of operation. If no hours are listed, the approving municipality and the Division will assume you are seeking authorization to operate during all hours allowed under Chapter 125, Wis. Stats.
- Box 4-9: Identify the premises address.
- Box 10-13: If you are requesting authorization to move your unlimited transfer outlet to a specific event, provide contact information for the event organizer, if not the named applicant.
- Box 14: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI, 12345, and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000 square foot building.

Example: The premises is the 1,000-square-foot tent within the southwest corner of the parking lot located at XYZ Church at 3456 Main St., Realtown, WI, 12345. All sales and storage of alcohol beverages and records will occur within the 1,000-square-foot tent in the southwest corner of the parking lot.

Example: The premises is located at PDQ Park (7890 Main St., Realtown, WI, 12345). A 5,000-square-foot tent will be constructed in the northeast corner of the park bordering the tree line and northern fence. All alcohol beverage sales and consumption will occur at this tent. Premises includes the adjacent north park office and the space between the tent and the office. Alcohol beverages and records will be securely stored in the north park office for the duration of the event.

- Box 15-17: Provide the name and contact information for a person who will be in control of the premises for the duration of the requested time.
- Box 18: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and Division of Alcohol Beverages approval.
- Box 19: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer under all their permits.
- Box 20: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 21: Check all the types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 14.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume

away from the premises identified in Box 14.

Part F: Attestation

- Read the attestation carefully, then sign and date.

Part G: For Municipal Use Only

- Box 1: Check yes or no to indicate if the municipality will limit the scope of alcohol beverages offered for sale at this full-service retail outlet.
- Box 2: Check yes or no to indicate if the municipality will impose other requirements or restrictions on the full-service retail outlet.
- Box 3: Describe any limitations the municipality has placed on the full-service retail outlet as indicated in questions 1 or 2. Some limitations may be: parking, zoning, or noise ordinance restrictions; not allowing sales of alcohol beverages for off-premises consumption.
- Box 4-10: The municipal official completing this part should fill in the information requested.

Completion and Submission of Form AB-105

- The producer applicant should complete Parts A, B, and F completely, and either Part C, D, or E, depending on the type of authorization requested.
- If requesting only a Part C authorization, the application can be submitted directly to the Division of Alcohol Beverages. No municipal approval is required for Part C authorizations.
- If requesting a Part D or E authorization, provide the application to the municipality where the proposed full-service retail outlet will be located.
 - The municipality should complete Part G and return it to the producer applicant.
 - The producer applicant should provide the completed AB-105 to the Division of Alcohol Beverages for final approval.
- Sales of alcohol beverages at full-service retail outlets may not commence until the Division of Alcohol Beverages has provided final approval by way of issuing a printed authorization to the applicant to be posted at the retail premises identified in this application.

After Form AB-105 is completed by the producer and approved by the municipality in Part G, submit the form to the Division of Alcohol Beverages for final approval in one of two ways:

- Email: DORAlcoholPermits@wisconsin.gov
- Mail the form to the following address:

Wisconsin Department of Revenue
Division of Alcohol Beverages
P.O. Box 8934
Madison, WI 53708-8934

Assistance

This form is designed by the Department of Revenue. If you require assistance with this form, consider reaching out to the Division of Alcohol Beverages for assistance with submission of this application and associated forms.

If you have questions about alcohol beverage laws and regulations, you may contact the Division of Alcohol Beverages using the contact information below.

Website: [DOR Alcohol Beverage \(wi.gov\)](http://DORAlcoholBeverage.wi.gov)

Write: DORAlcohol@wisconsin.gov

Call: (608) 264-4573

Part A: Producer Information

1. Business Legal Name (individual name if sole proprietor)		
2. Business Name or DBA	3. Agent Name	
4. FEIN	5. Wisconsin Seller's Permit Number	
6. Wisconsin Producer Permit Number	7. Producer Type ☐ Brewery ☐ Winery ☐ Liquor Manufacturer/Rectifier	
8. Contact Person's First Name	9. Last Name	10. M.I.
11. Contact Person's Phone	12. Contact Person's Email	

Part B: Production Quantity

Note: Check appropriate quantity for permit held (see instructions). If you hold more than one producer permit, check the total aggregate quantity produced for each type of permit. Enter the highest quantity produced in any of the last three calendar years.

Brewery	Manufacturer/Rectifier	Winery
☐ Less than 250 barrels	☐ Less than 1,500 liters	☐ Less than 1,000 gallons
☐ 250 - 2,499 barrels	☐ 1,500 - 4,999 liters	☐ 1,000 - 4,999 gallons
☐ 2,500 - 7,499 barrels	☐ 5,000 - 34,999 liters	☐ 5,000 - 24,999 gallons
☐ 7,500 or more barrels	☐ 35,000 or more liters	☐ 25,000 or more gallons
Calendar year:	Calendar year:	Calendar year:
Quantity:	Quantity:	Quantity:

Complete only ONE of Part C, D or E.**Part C: Request for Full-Service Retail Sales at the Production Premises**

1. Start Date	2. Production Premises Address		
3. City	4. State	5. Zip Code	
6. County	7. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		

Part D: Request for Fixed Full-Service Retail Outlet

1. Are you transferring one fixed full-service retail outlet to a new location? ☐ Yes ☐ No If yes, complete boxes 2 through 9.			
2. Current Outlet Name			
3. Current Outlet Premises Address			
4. City	5. State	6. Zip Code	
7. County	8. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		9. Premises Phone Number

Continued →

Part D: Request for Fixed Full-Service Retail Outlet (Cont.)**New Fixed Retail Outlet Information (complete boxes 10 through 23)**

10. Start Date	11. New Outlet Name		
12. New Outlet Premises Address			
13. City		14. State	15. Zip Code
16. County	17. Governing Municipality ☐ City ☐ Town ☐ Village of: _____		18. Premises Phone Number
19. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.			
20. Will you operate a restaurant on the premises? ☐ Yes ☐ No			
21. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
22. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)			
23. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption			

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

1. Name of Event (if applicable)		
2. Dates of Operation (attach a schedule, if necessary)		3. Hours of Operation
4. Premises Address		
5. City		6. State 7. Zip Code
8. County		9. Governing Municipality ☐ City ☐ Town ☐ Village of: _____
10. Organizer of Event (if not the named applicant)		11. Email and/or Phone Number for Organizer of Event
12. Organizer Website		13. Event Website
14. Premises Description - Describe the building or buildings and any outside areas where alcohol beverages are produced, sold, stored, or consumed, and related records are kept. Describe all rooms within the building, including living quarters. Authorized alcohol beverage activities and storage of records may occur only on the premises described in this application. Attach a map or diagram and additional sheets if necessary.		
15. On-Site Contact (Last Name, First Name)		16. On-Site Contact Phone 17. On-Site Contact Email
18. Will you operate a restaurant on the premises? ☐ Yes ☐ No		
19. What alcohol beverages will be offered for sale? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
20. What alcohol beverages does the permittee produce? (check all that apply) ☐ Beer ☐ Wine ☐ Intoxicating Liquor (other than wine)		
21. How will customers be served? (check all that apply) . . . ☐ Samples ☐ On-premises consumption ☐ Off-premises consumption		

Part F: Attestation

Who must sign this application?

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

READ CAREFULLY BEFORE SIGNING:

I understand and agree to the following:

- I will not operate this location outside of the dates and times approved by the municipality and Division of Alcohol Beverages.
- I will operate this location according to municipal ordinance and restrictions imposed as a condition of receiving this authorization.
- I will purchase alcohol beverages I do not produce from an authorized source, such as a Wisconsin-permitted wholesaler.
- I will operate this location according to Wisconsin law and administrative regulation including but not limited to: underage restrictions, closing hours, licensed operators, and record keeping requirements.

Further, under penalty of law, I have answered each of the above questions completely and truthfully. I agree that I am acting solely on behalf of the applicant business and not on behalf of any other individual or entity seeking the authorization. Further, I agree that the rights and responsibilities conferred by the authorization, if granted, will not be assigned to another individual or entity. I understand that lack of access to any portion of a premises during inspection will be deemed a refusal to allow inspection. Such refusal is a misdemeanor and grounds for revocation of this authorization. I understand that any authorization issued contrary to Wis. Stats. Chapter 125 shall be void under penalty of Wisconsin law. I further understand that I may be prosecuted for submitting false statements and affidavits in connection with this application, and that any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000 if convicted.

Signature

David E. Kowalske

Date

Last Name

First Name

M.I.

Title

Email

Phone

Part G: For Municipal Use Only (Complete if Requesting Authorization in Part D or E)1. Will the municipality limit the scope of alcohol beverages offered for sale? ☐ Yes ☐ No2. Will the municipality impose any requirements or restrictions for the full-service retail outlet? ☐ Yes ☐ No

3. Describe municipal restrictions indicated in questions 1 or 2 above.

4. Last Name of Municipal Official

5. First Name

6. M.I.

7. Signature of Municipal Official

8. Date

9. Date Application was Filed with Clerk

10. Date Full-Service Retail Outlet Approved by Governing Body

Form AB-105 Instructions

Producer Full-Service Retail Sales Application

Who may apply for full-service retail sales?

Producer permittees may apply for full-service retail sales on or off the production premises. Producer permittees include brewers, rectifiers, manufacturers, and wineries.

Who qualifies for full-service retail sales?

- A brewery that manufactures a minimum of 250 barrels of fermented malt beverages.
- A manufacturer/rectifier that produces a minimum of 1,500 liters of intoxicating liquor.
- A winery that produces a minimum of 1,000 gallons of wine.

What are full-service retail sales?

Permittees that are granted full-service retail sales privileges may:

- Sell fermented malt beverages and intoxicating liquor at retail for on- or off-premises consumption at their production premises and at one or more off-site full-service retail outlets.
- Provide taste samples of fermented malt beverages and intoxicating liquor.

What are full-service retail outlets?

Full-service retail outlets are authorized locations for full-service retail sales at places other than the permittee's production premises.

What is the difference between a fixed and unlimited transfer full-service retail outlet?

Fixed full-service retail outlets may be transferred from one location to another once per year. Unlimited transfer full-service retail outlets may be transferred an unlimited number of times in a year. Only one of a producer's full-service retail outlets may be transferred without limitation on frequency.

How many full-service retail outlets may I have?

The number of full-service retail outlets a producer qualifies for is determined by alcohol beverage production volume. Producers may have a maximum of three full-service outlets, regardless of the number or type of producer permits they hold.

Who approves full-service retail sales?

Full-service retail sales on the production premises need only be approved by the Division of Alcohol Beverages. Municipalities do not issue licenses for full-service retail sales outlets; however, municipalities must approve of the outlets. The applicant must forward the municipal approval to the Division of Alcohol Beverages for final granting of the authority for sales to commence on the premises.

Can a municipality limit authorized sales at a full-service retail outlet?

Yes, a municipality can limit authorized sales at a full-service retail outlet. Municipalities may limit the scope of alcohol beverages offered for sale by the permittee. Municipal approval of a full-service retail outlet must be based on the same standards and criteria, established by ordinance, for the evaluation and approval of retail licenses. A municipality may not impose any requirement or restriction in connection with the approval that the municipality does not impose on retail licensees.

How do I fill out Form AB-105 and begin the application process?

Authorizations requested on Form AB-105 must be applied for only one premises in one municipality at a time. To request multiple authorizations, submit a separate Form AB-105 for each location/premises.

Parts A, B, and F: Applicants must complete Parts A, B, and F.

Parts C, D, and E: Complete only one Part. Form AB-105 must be used to request only one authorization at a time.

Example: A producer applicant requesting full-service retail sales authorization on the production premises should complete Parts A, B, C, and F.

Example: A producer applicant requesting a fixed full-service retail outlet should complete Parts A, B, D, and F.

Example: A producer applicant requesting an unlimited transfer full-service retail outlet should complete Parts A, B, E, and F. Producer applicants requesting authorization in Part E must complete one Form AB-105 for each premises. Applicants may use the same Form AB-105 to request authorization for multiple dates and times occurring on the same premises.

Municipal approval is required for authorizations requested in Parts D and E. If a producer is applying for authorization in either of these sections, the completed application must first be submitted to the governing municipality.

After the municipality has granted approval by completing Part G, the applicant should submit AB-105 to the Division of Alcohol Beverages for final approval. If the applicant is only requesting authorization in Part C, the application does not require municipal approval and may be submitted directly to the Division of Alcohol Beverages.

Specific Instructions:

Part A: Producer Information

- Box 1: Enter the legal business name.
- Box 2: Enter the trade name or “doing business as” name, if different than the name in box 1.
- Box 3: Enter the name of the approved agent appointed for your producer permit.
- Box 4: Enter Federal Employer Identification Number (FEIN).
- Box 5: Enter Wisconsin seller’s permit number.
- Box 6: Enter the 15-digit Wisconsin Tax Account Number of the permit that these authorizations should be associated with.
- Box 7: Check the corresponding producer permit type.
- Box 8-10: Enter contact person’s name.
- Box 11: Enter contact person’s phone number.
- Box 12: Enter contact person’s email address.

Part B: Production Quantity

- Check the highest cumulative total of alcohol beverages produced in any one of the three preceding calendar years for each specific permit type held.
 - Do not include alcohol beverages produced under a contract production agreement.
- Enter the calendar year in which the highest cumulative total of alcohol beverages produced was met.
- Enter the exact quantity of alcohol beverages produced.
- If an applicant holds more than one type of permit or multiple permits of the same type, the aggregate number of full-service retail outlets that may be established is the maximum number authorized under their permit type, but not exceeding three full-service retail outlets.
 - Under these circumstances, each authorized full-service retail outlet shall serve as the full-service retail outlet associated with each applicable permit, regardless of whether permittee would otherwise be entitled to fewer full-service retail outlets when calculated under their other permit(s).

Part C: Request for Full-Service Retail Sales at the Production Premises

- Authorization under this portion does not require municipal approval. If the applicant is not seeking other retail authorizations on this form, it can be submitted directly to the Division of Alcohol Beverages.
- Box 1: Enter the date that you would like to begin full-service retail sales.
- Box 2-5: List the premises address for the permit identified in Part A, boxes 5 and 6.
- Box 6: Name the county where the production premises is located.
- Box 7: Name the governing municipality where the production premises is located.

Part D: Request for Fixed Full-Service Retail Outlet

- Authorization under this section must be approved by the municipality in which the retail outlet is located prior to submitting to the Division of Alcohol Beverages for final approval.
- Box 1: Check yes if you are applying to transfer a fixed full-service outlet from one location to another. Fixed Full-Service Retail Outlets may be transferred from place-to-place once per year with approval of the municipality that governs the new location.
- Boxes 2-9: Complete these boxes if you checked yes in box 1 to describe the current premises you are applying to transfer.

- Box 10: Enter the date that you would like to open the full-service retail outlet for business.
- Boxes 11-18: Complete these boxes to describe the location of your new premises.
- Box 19: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI 12345 and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000-square-foot building.

- Box 20: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and division approval.
- Box 21: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer or producer group.
- Box 22: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 23: Check all types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 18.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume away from the premises identified in Box 18.

Part E: Request for Unlimited Transfer Full-Service Retail Outlet

- Authorizations under Part E must be for dates of operation where the unlimited transfer location will be located at the same premises in the same municipality. You must use a new Form AB-105 to request authorization for each separate premises, regardless of whether the separate premises are in the same municipality.
- Box 1: If you are requesting authorization to initiate or move your unlimited transfer outlet to a specific event like a farmer's market, festival, or other community event, name it here.
- Box 2: List the requested dates of operation. Attach a schedule or calendar of events, if necessary.
- Box 3: List the requested hours of operation. If no hours are listed, the approving municipality and the Division will assume you are seeking authorization to operate during all hours allowed under Chapter 125, Wis. Stats.
- Box 4-9: Identify the premises address.
- Box 10-13: If you are requesting authorization to move your unlimited transfer outlet to a specific event, provide contact information for the event organizer, if not the named applicant.
- Box 14: Describe the premises in detail. Include outdoor spaces if the municipality allows it. Attach a floor plan if possible.

Example: The premises is located at 1234 Main St., Realtown, WI, 12345, and includes only the first-floor bar room, dining room, kitchen, north storage room, and south office of the 5,000 square foot building.

Example: The premises is the 1,000-square-foot tent within the southwest corner of the parking lot located at XYZ Church at 3456 Main St., Realtown, WI, 12345. All sales and storage of alcohol beverages and records will occur within the 1,000-square-foot tent in the southwest corner of the parking lot.

Example: The premises is located at PDQ Park (7890 Main St., Realtown, WI, 12345). A 5,000-square-foot tent will be constructed in the northeast corner of the park bordering the tree line and northern fence. All alcohol beverage sales and consumption will occur at this tent. Premises includes the adjacent north park office and the space between the tent and the office. Alcohol beverages and records will be securely stored in the north park office for the duration of the event.

- Box 15-17: Provide the name and contact information for a person who will be in control of the premises for the duration of the requested time.
- Box 18: Producers may operate a restaurant on the premises of a full-service retail outlet with municipal and Division of Alcohol Beverages approval.
- Box 19: Check all types of alcohol beverages that will be offered for sale at the full-service retail outlet, including beverages made by the producer under all their permits.
- Box 20: Check all the alcohol beverages that are made by the producer under all their permits.
- Box 21: Check all the types of service that apply to this full-service retail outlet.
 - Samples mean 3 oz. of beer, 3 oz. of wine, or 0.5 oz. of liquor provided free of charge to an individual.
 - On-premises consumption means alcohol beverages served by the glass to be consumed by the customer at the premises identified in Box 14.
 - Off-premises consumption means alcohol beverages sold in original, unopened containers for customers to consume

away from the premises identified in Box 14.

Part F: Attestation

- Read the attestation carefully, then sign and date.

Part G: For Municipal Use Only

- Box 1: Check yes or no to indicate if the municipality will limit the scope of alcohol beverages offered for sale at this full-service retail outlet.
- Box 2: Check yes or no to indicate if the municipality will impose other requirements or restrictions on the full-service retail outlet.
- Box 3: Describe any limitations the municipality has placed on the full-service retail outlet as indicated in questions 1 or 2. Some limitations may be: parking, zoning, or noise ordinance restrictions; not allowing sales of alcohol beverages for off-premises consumption.
- Box 4-10: The municipal official completing this part should fill in the information requested.

Completion and Submission of Form AB-105

- The producer applicant should complete Parts A, B, and F completely, and either Part C, D, or E, depending on the type of authorization requested.
- If requesting only a Part C authorization, the application can be submitted directly to the Division of Alcohol Beverages. No municipal approval is required for Part C authorizations.
- If requesting a Part D or E authorization, provide the application to the municipality where the proposed full-service retail outlet will be located.
 - The municipality should complete Part G and return it to the producer applicant.
 - The producer applicant should provide the completed AB-105 to the Division of Alcohol Beverages for final approval.
- Sales of alcohol beverages at full-service retail outlets may not commence until the Division of Alcohol Beverages has provided final approval by way of issuing a printed authorization to the applicant to be posted at the retail premises identified in this application.

After Form AB-105 is completed by the producer and approved by the municipality in Part G, submit the form to the Division of Alcohol Beverages for final approval in one of two ways:

- Email: DORAlcoholPermits@wisconsin.gov
- Mail the form to the following address:

Wisconsin Department of Revenue
Division of Alcohol Beverages
P.O. Box 8934
Madison, WI 53708-8934

Assistance

This form is designed by the Department of Revenue. If you require assistance with this form, consider reaching out to the Division of Alcohol Beverages for assistance with submission of this application and associated forms.

If you have questions about alcohol beverage laws and regulations, you may contact the Division of Alcohol Beverages using the contact information below.

Website: [DOR Alcohol Beverage \(wi.gov\)](http://DORAlcoholBeverage.wi.gov)

Write: DORAlcohol@wisconsin.gov

Call: (608) 264-4573

Human Resource Department

Common Council Update
Tuesday, July 28, 2026



The Team



- Rebecca Freisleben
 - Benefits Administrator
 - Focus: benefit administration and leave processing

- Melissa Beck
 - Human Resource Director
 - Focus: Strategic planning, talent management, culture and engagement, compliance and risk management

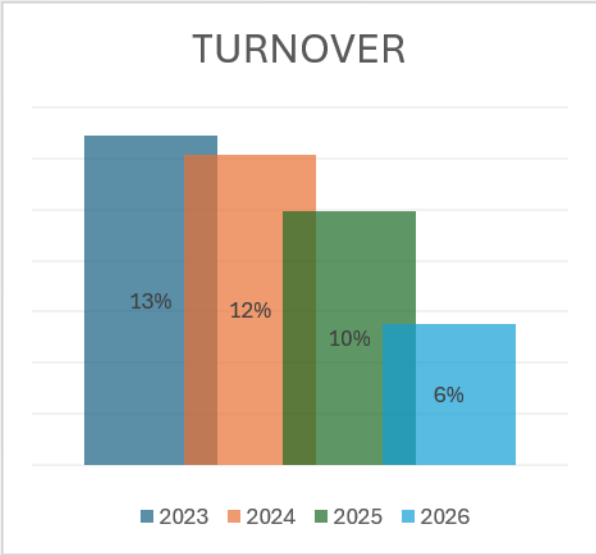
- HR Manager - Vacant

Department Vision



- Improve employee engagement through effective communication and education for all employees.
- Cultivate trust and respect to maintain positive interactions with employees.
- Fulfill statutory duties and maintain the highest standards of ethics and integrity.
- Position the Human Resource Department as a Center of Excellence with a focus on initiatives to improve performance, growth and employee satisfaction.

Staffing Update



In addition to our regular hiring, we have averaged 100 seasonal hires per year over the past 4 years.

Staffing Challenges



- We continue to compete with the private sector positions as well as neighboring communities
 - Continue to promote the benefits of working for the public sector
 - Continue to improve upon our compensation and benefits program
- Changes to recruiting platforms
 - The platforms we use are no longer free to advertise our postings
 - Continue to look for alternatives
 - Account for recruiting costs in the budgets
- Difficult to fill positions
 - Review the job descriptions and compensation to ensure we are in alignment with other municipalities
- Although we have had some difficulty filling certain positions, the number of applicants per job posting has doubled since 2022.

HR Project Updates



- City wide door access process change
 - HR, PD, IT and DPW have streamlined the door access for city staff, volunteers, and contractors to ensure safety and security of city staff and facilities.
 - Created SOP and assigned door access by position and the group collaborates on any changes

- PD Time & Attendance
 - HR, Finance and PD worked collaboratively to move the Police union staff from Kronos timekeeping over to Time & Attendance to align with all other city staff

- First Due Implementation
 - HR, Finance and IT worked collaboratively with the Fire Department for the implementation of First Due for their timekeeping system.

HR Project Updates



➤ Employee Access

- HR, Finance and IT are working together to transition from Employee Self Service to the newer platform Employee Access
- The new platform increases capabilities for staff to submit updates to personal information, update tax withholdings, and direct deposit
- HR is setting up the new platform to the open enrollment online and once that is complete employees will have access to see what benefits they are enrolled in.

➤ Wellness

- Continue to focus on employee wellness activities to increase employee engagement
 - Wellness walk, step challenge, National fruit day, National RB Float day, National Icee day, popcorn days
- Sponsored a family for Christmas through the Christmas Clearing Council and city staff went over and above
- Wellness Fair coming up in September



HR Project Updates



- Liability Insurance
 - A risk management team was created (DPW/FIN/HR) to monitor and manage the City's P&C lines of coverage; MPIC and CVMIC
 - New reporting forms were created and an informational webpage was added for staff
 - A revaluation of our property coverage was completed in the Spring
 - We moved to a Nurse Hotline for our Work Comp reporting which has helped streamline the process for both HR and the staff

- Health Plan
 - HR and Finance worked together to successfully move the City to the current self-funded health plan for 2026
 - Implementing a Health Risk Assessment in the Fall of 2026

Ongoing HR Focus



- Compensation Strategy
 - Goal is to review positions on a rotating schedule
 - May have need to review positions as warranted
 - Reviewed and applied market adjustments for three job classes in 2026
- Benefit Program
 - Continue to research options to enhance benefits and contain costs to provide competitive benefits for employees
- Recruitment
 - Continue to improve upon the recruitment process with Hiring Managers
 - Increase recruitment advertising across more mediums
 - Increase marketing efforts
- Onboarding
 - Improve the onboarding experience for new employees
 - Create virtual onboarding processes
 - Improve upon training opportunities and tracking

Thank you for all that you do!

QUESTIONS?

Finance Department



Agenda

- Who We Are
- What We Do
- How We Track It
- Future initiatives





Who We Are



Who We Are

Finance Director - Matthew Uselding (0.16 Yrs)

Deputy Finance Director - Amy Miller (3 Yrs)

Bookkeeper - Thu Van Hintz (14 Yrs)

Cashier - Kelly Tice (3 Yrs)

Payroll Coordinator - Kathy Frahmman (7.5 Yrs)

Accounting Clerk - Sandy Neylon (1.5 Yrs)

Historical Staffing Levels

Position	2024 FTE	2025 FTE	2026 FTE	2027 FTE
Director of Finance/Treasurer	1.0	1.0	1.0	1.0
Deputy Director of Finance	1.0	1.0	1.0	1.0
Accounting Manager	-	-	-	-
Bookkeeper	1.0	1.0	1.0	1.0
Payroll Coordinator	0.7	0.7	0.7	0.7
Payroll Associate	0.5	0.5	0.5	0.5
Cashier	1.0	1.0	1.0	1.0
Total	5.2	5.2	5.2	5.2

Staffing Levels - Comparison

Position	2026 FTE
Director of Finance/Treasurer	1.0
Deputy Director of Finance	1.0
Accounting Manager	-
Bookkeeper	1.0
Payroll Coordinator	0.7
Payroll Associate	0.5
Cashier	1.0
Total	5.2

Brookfield 2026	FTE	Wauwatosa 2026	FTE
Director of Finance & Admin	1.0	Accounting Analyst	1.8
Deputy Finance Director	1.0	Account Manager	1.0
Finance Manager	1.0	Accounts Payable/Payroll Specialist	1.0
Deputy Treasurer	1.0	Assistant Finance Director	1.0
Management Accountant	1.0	Finance Director	1.0
Payroll Management Accountant	1.0	Finance Intern	0.5
Accountant	1.0	Financial Analyst	1.0
Accounting Clerk	1.0	Office Assistant	1.5
Office Services Assistant	1.5	Payroll Manager/Senior Accountant	1.0
		Purchasing Manager	1.0
TOTAL	9.5	TOTAL	10.8



What We Do

What We Do - Collect The Money



PROPERTY TAX
COLLECTION



UTILITY BILLING



STATE AID/OTHER
CITY REVENUE

Tax Collection



Taxing Jurisdiction	Total Tax Levy
County	\$ 10,464,890
City	\$ 40,046,319
School Districts	\$ 50,972,880
Technical Colleges	\$ 2,289,930
Total	\$ 103,774,019



Primary revenue source for most municipalities.

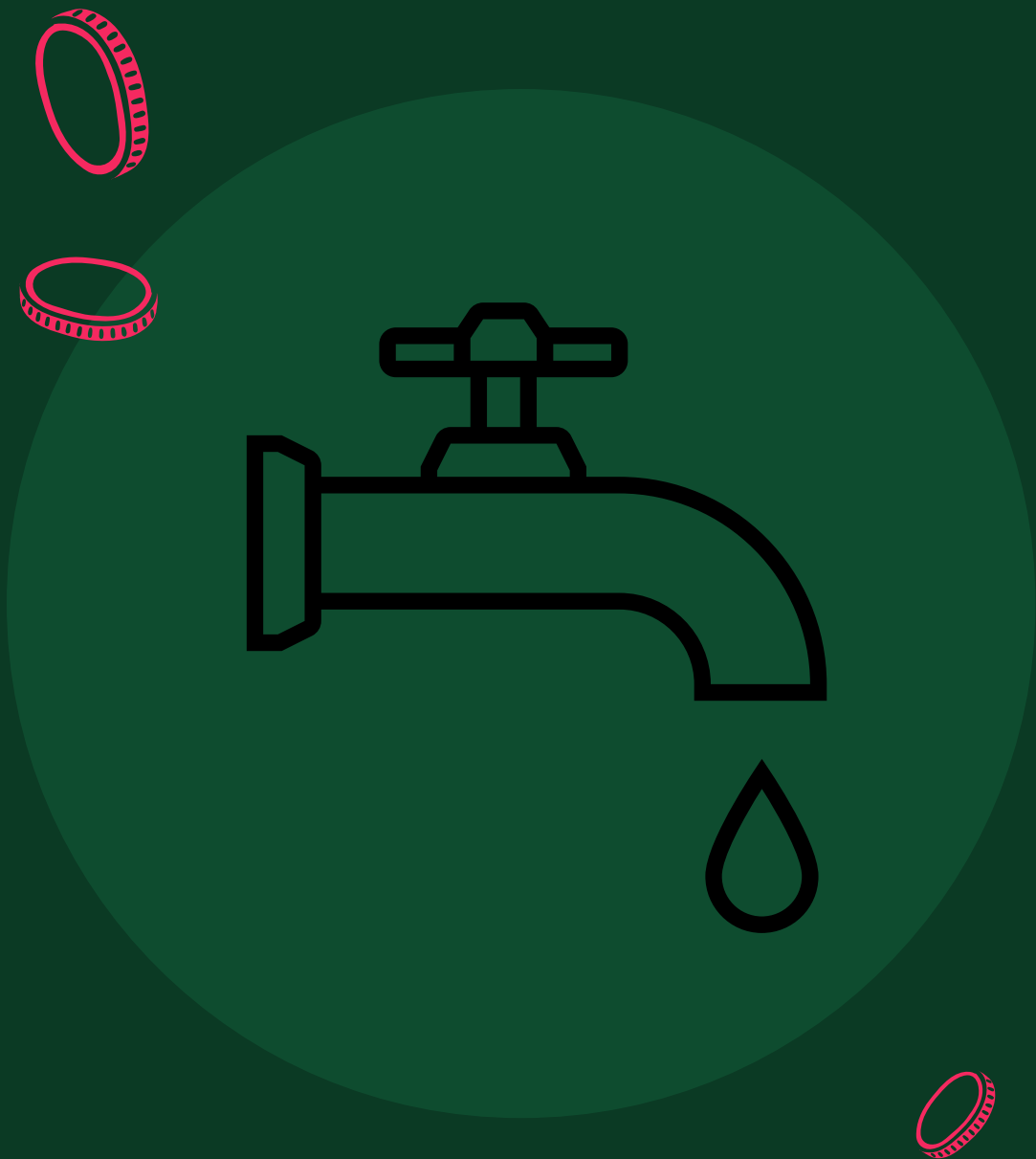


Tax bills are based on the property's assessed value and the municipality's adopted tax levy.



Municipalities collect taxes on behalf of multiple taxing jurisdictions

8 Taxing Jurisdictions



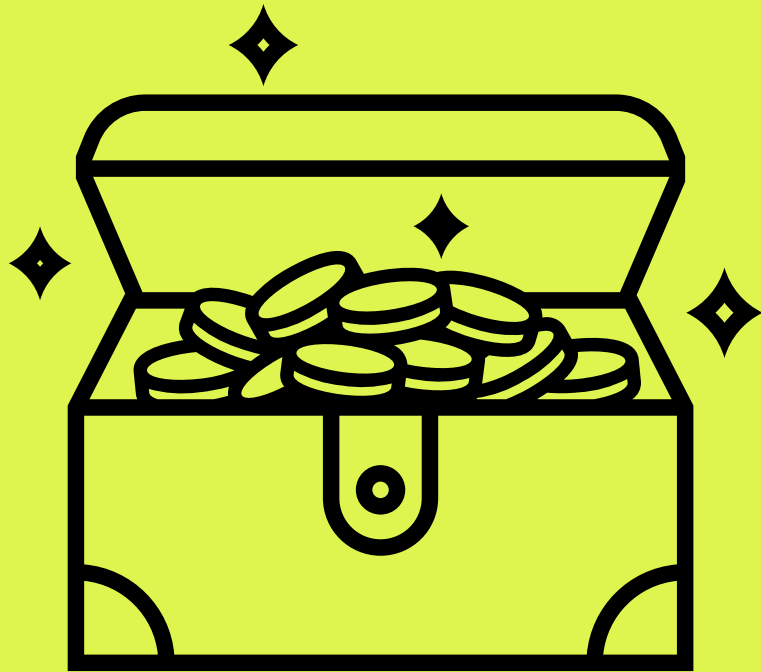
Utility Revenue

Utility	Budget
WATER RESOURCE MGMT	1,984,500
SEWER	11,582,625
WATER	7,440,435
Total	21,007,560

General Fund Revenue

ACCOUNT DESCRIPTION	ORIGINAL APPROP
TAXES	\$ 38,361,785
INTERGOVERNMENTAL	\$ 6,019,078
LICENSES AND PERMITS	\$ 1,443,760
FINES & FORFEITURES	\$ 380,000
CHARGES FOR SERVICE	\$ 3,464,390
INTERDEPARTMENT	\$ 643,149
INVESTMENT INCOME	\$ 2,300,000
MISC REVENUES	\$ 245,158
TRANSFER	\$ 880,000
APPROPRIATION OF SURP	\$ 1,600,000
Grand Total	\$ 55,337,320

What We Do - Invest The Money



Investment Management

- ▶ Governed by Wisconsin Statutes and the City's Investment Policy
- ▶ Passive investment strategy focused on safety, liquidity, and return
- ▶ Funds invested primarily in the Wisconsin LGIP, CDs, and Federal Agencies
- ▶ WISC member utilizing state-contracted investment services
- ▶ All available cash is invested to maximize earnings while maintaining liquidity

What We Do - Spend The Money



VENDORS



EMPLOYEES



DEBT SERVICE

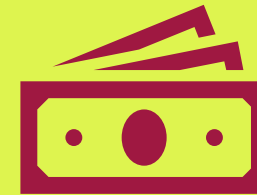
Spend the Money - Vendors



19,949 Active
Vendors



4,442 Checks
Issued



\$31 million

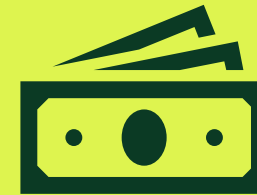
Spend the Money - Employees



9,245 Checks
issued



623 W-2's Issued

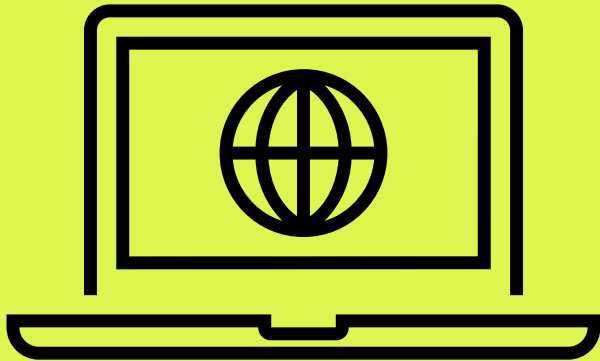


\$23.7 million gross
salaries



How We Track It

How We Track It - Technology



Tyler Munis

- ERP System since 2004
- Cloud Based
- Early WI adopter

Banyon

- Tax Collection Software
- Implemented in 2025

Tyler Payments

- Online Payment portal for Utility Bills and Permits

BMO Bank

How We Track It - Reporting



Annual Financial Statements

- Statements for City, Water, and Sewer
- Audited by Baker Tilly
- Clean Audit

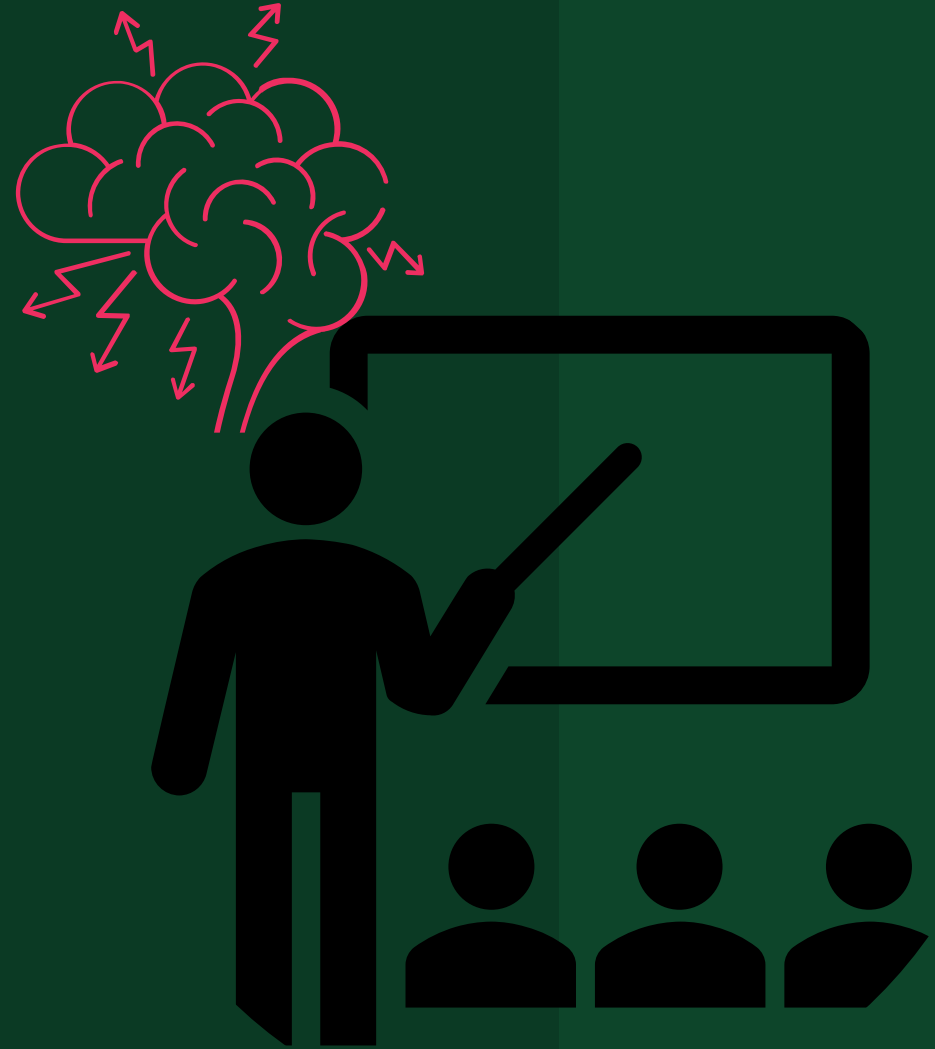
Monthly & Quarterly Reports

- Budget to Actual
- YoY Actual
- Monthly Investment Summary
- CIP Projects

Federal and State Reports

- PSC Report - Water Utility
- Statements of Taxes
- State Financial Report
- Other Misc. Reports to State and Federal Governments

Future Initiatives



Future initiatives



Become fully integrated into City procedures, policies, and operational processes while leading the Finance Department through the budget cycle, tax settlement, and annual audit.



Implement Tyler Content Manager (TCM) to improve document management, workflow automation, and records retention.



Review and update Finance Department policies, including Purchasing and Vendor Check Disbursement.



Standardize and document Finance procedures, including payroll schedules and Accounts Payable workflows.



Modernize permitting-related financial processes by implementing credit card payments for permit fees. Collaborate with the Inspection Department to improve permit mailing procedures and overall workflow.

Thank you



July 28, 2026

PRE-SALE REPORT FOR

City of New Berlin, Wisconsin

\$10,130,000 General Obligation Promissory Notes, Series 2026A



Prepared by:

Ehlers
N19W24400 Riverwood Drive,
Suite 100
Waukesha, WI 53188

Advisors:

Greg Johnson, Senior Municipal Advisor
Harry Allen, Senior Municipal Advisor

BUILDING COMMUNITIES. IT'S WHAT WE DO.

EXECUTIVE SUMMARY OF PROPOSED DEBT

Proposed Issue:

\$10,130,000 General Obligation Promissory Notes, Series 2026A

Purposes:

The proposed issue includes financing for the following purposes:

For public purposes including paying the cost of the City's 2026 capital improvement projects including building and grounds improvements, equipment, street improvements, and park improvements. Debt service will be paid from ad valorem property taxes.

Authority:

The Notes are being issued pursuant to Wisconsin Statute(s):

- 67.12(12)

The Notes will be general obligations of the City for which its full faith, credit and taxing powers are pledged.

The Notes count against the City's General Obligation Debt Capacity Limit of 5% of total City Equalized Valuation. At the end of 2026, the City's total General Obligation debt principal outstanding will be approximately \$97,140,000, which is 22% of its projected limit. Estimated remaining General Obligation Borrowing Capacity will be approximately \$339 million.

Term/Call Feature:

The Notes are being issued for a term of 10 years. Principal on the Notes will be due on June 1 in the years 2027 through 2036. Interest will be due every six months beginning June 1, 2027.

The Notes will be subject to prepayment at the discretion of the City on June 1, 2034 or any date thereafter.

Bank Qualification:

Because the City is issuing, or expects to issue, more than \$10,000,000 in tax-exempt obligations during the calendar year, the City will be not able to designate the Notes as "bank qualified" obligations.

Rating:

The City's most recent bond issues were rated by Moody's Investors Service. The current rating on those bonds is "Aaa". The City will request a new rating for the Notes.

Basis for Recommendation:

Based on your objectives, financial situation and need, risk tolerance, liquidity needs, experience with the issuance of Notes and long-term financial capacity, as well as the tax status considerations related to the Notes and the structure, timing and other similar matters related to the Notes, we are recommending the issuance of Notes as a suitable option.

Method of Sale/Placement:

We are recommending the Notes be issued as municipal securities and offered through a competitive underwriting process. You will solicit competitive bids, which we will compile on your behalf, for the purchase of the Notes from underwriters and banks. An allowance for discount bidding will be incorporated in the terms of the issue. The discount is treated as an interest item and provides the underwriter with all or a portion of their compensation in the transaction. If the Notes are purchased at a price greater than the minimum bid amount (maximum discount), the unused allowance may be used to reduce your borrowing amount.

Premium Pricing:

In some cases, investors in municipal bonds prefer “premium” pricing structures. A premium is achieved when the coupon for any maturity (the interest rate paid by the issuer) exceeds the yield to the investor, resulting in a price paid that is greater than the face value of the bonds. The sum of the amounts paid in excess of face value is considered “reoffering premium.” For this issue of Notes, any premium amount received that is in excess of the underwriting discount and any capitalized interest amounts must be placed in the debt service fund and used to pay a portion of the interest payments due on the Notes.

The amount of premium allowed can be restricted in the bid specifications. Restrictions on premium may result in fewer bids, but may also eliminate large adjustments on the day of sale and unintended results with respect to debt service payment impacts. Ehlers will identify appropriate premium restrictions for the Notes intended to achieve the City’s objectives for this financing.

Other Considerations:

The Notes will be offered with the option of the successful bidder utilizing a term bond structure. By offering underwriters the option to “term up” some of the maturities at the time of the sale, it gives them more flexibility in finding a market for your Notes. This makes your issue more marketable, which can result in lower borrowing costs. In the event that the successful bidder utilizes a term bond structure, we recommend the City retain a paying agent to handle responsibility for processing mandatory redemption/call notices associated with term bonds.

Review of Existing Debt:

We have reviewed all outstanding indebtedness for the City and find that there are no refunding opportunities at this time

Continuing Disclosure:

Because the City has more than \$10,000,000 in outstanding debt subject to a continuing disclosure undertaking (including this issue) and this issue does not meet an available exemption from continuing disclosure, the City will be agreeing to provide certain updated Annual Financial Information and its Audited Financial Statement annually, as well as providing notices of the occurrence of certain reportable events to the Municipal Securities Rulemaking Board (the “MSRB”), as required by rules of the Securities and Exchange Commission (SEC). The City is already obligated to provide such reports for its existing bonds, and has contracted with Ehlers to prepare and file the reports.

Arbitrage Monitoring:

The City must ensure compliance with certain sections of the Internal Revenue Code and Treasury Regulations (“Arbitrage Rules”) throughout the life of the issue to maintain the tax-exempt status of the Notes. These Arbitrage Rules apply to amounts held in construction, escrow, reserve, debt service account(s), etc., along with related investment income on each fund/account.

IRS audits will verify compliance with rebate, yield restriction and records retention requirements within the Arbitrage Rules. The City’s specific arbitrage responsibilities will be detailed in the Tax Exemption Certificate (the “Tax Compliance Document”) prepared by your Bond Attorney and provided at closing.

The Notes may qualify for one or more exception(s) to the Arbitrage Rules by meeting 1) small issuer exception, 2) spend down requirements, 3) bona fide debt service fund limits, 4) reasonable reserve requirements, 5) expenditure within an available period limitations, 6) investments yield restrictions, 7) de minimis rules, or; 8) borrower limited requirements.

An Ehlers arbitrage expert will contact the City within 30 days after the sale date to review the City’s specific responsibilities for the Notes. The City is currently receiving arbitrage services from Ehlers in relation to the Notes.

Investment of Note Proceeds:

Ehlers can assist the City in developing a strategy to invest your Note proceeds until the funds are needed to pay project costs.

Other Service Providers:

This debt issuance will require the engagement of other public finance service providers. This section identifies those other service providers, so Ehlers can coordinate their engagement on your behalf. Where you have previously used a particular firm to provide a service, we have assumed that you will continue that relationship. For services you have not previously required, we have identified a service provider. Fees charged by these service providers will be paid from proceeds of the obligation, unless you notify us that you wish to pay them from other sources. Our pre-sale bond sizing includes a good faith estimate of these fees, but the final fees may vary. If you have any questions pertaining to the identified service providers or

their role, or if you would like to use a different service provider for any of the listed services please contact us.

Bond Counsel: Quarles & Brady LLP

Paying Agent: Issuer

Rating Agency: Moody's Investors Service, Inc.

PROPOSED DEBT ISSUANCE SCHEDULE

Pre-Sale Review by City Council:	July 28, 2026
Due Diligence Call to Review Official Statement:	Week of August 10, 2026
Conference with Rating Agency:	Week of August 10, 2026
Distribute Official Statement:	August 18, 2026
City Council Meeting to Award Sale of the Notes:	August 25, 2026
Estimated Closing Date:	September 17, 2026

Attachments

Table 1: Summary of Existing G.O. Debt

Table 2: Project List

Table 3: Estimated Sources and Uses of Funds

Table 4: Estimated Proposed Debt Service Schedule

Table 5: Tax Impact Analysis

Table 6: G.O. Debt Borrowing Capacity

EHLERS' CONTACTS

Greg Johnson, Senior Municipal Advisor	(262) 796-6168
Harry Allen, Senior Municipal Advisor	(262) 796-6182
Dan Pagac, Public Finance Analyst	(262) 796-6163
Beth Mueller, Senior Financial Analyst	(651) 697-8553

Table 1

Existing G.O. Debt Base Case

City of New Berlin, WI

Year Ending	Existing Debt								Year Ending
	Total G.O. Debt Payments	Less: TID #3	Less: TID #5	Less: Debt Service Fund	Net Tax Levy	Equalized Value (TID OUT)	Tax Rate Per \$1,000	Annual Taxes \$300,000 of value	
2026	15,569,565	(535,940)	(644,850)	(821,466)	13,567,309	8,259,983,700	\$1.64	\$492.76	2026
2027	14,700,710	(551,090)	(807,225)	(181,843)	13,160,552	8,571,513,873	\$1.54	\$460.61	2027
2028	13,652,673	(624,063)	(780,200)		12,248,411	8,894,793,591	\$1.38	\$413.11	2028
2029	13,156,858	(622,753)	(753,400)		11,780,705	9,230,265,994	\$1.28	\$382.89	2029
2030	11,507,018	(623,535)	(726,600)		10,156,883	9,578,390,938	\$1.06	\$318.12	2030
2031	10,930,213	(558,425)	(699,800)		9,671,988	9,939,645,620	\$0.97	\$291.92	2031
2032	7,688,500	(540,600)	(775,400)		6,372,500	10,314,525,236	\$0.62	\$185.35	2032
2033	6,474,828	(520,200)	(731,700)		5,222,928	10,703,543,659	\$0.49	\$146.39	2033
2034	4,821,313	0	(770,000)		4,051,313	11,107,234,141	\$0.36	\$109.42	2034
2035	4,093,356		(742,000)		3,351,356	11,526,150,049	\$0.29	\$87.23	2035
2036	3,040,188		(714,000)		2,326,188	11,960,865,619	\$0.19	\$58.34	2036
2037	2,263,950		0		2,263,950	12,411,976,743	\$0.18	\$54.72	2037
2038	2,200,744				2,200,744	12,880,101,790	\$0.17	\$51.26	2038
2039	2,135,481				2,135,481	13,365,882,451	\$0.16	\$47.93	2039
2040	2,069,131				2,069,131	13,869,984,616	\$0.15	\$44.75	2040
2041	2,001,813				2,001,813	14,393,099,293	\$0.14	\$41.72	2041
2042	1,265,634				1,265,634	14,935,943,550	\$0.08	\$25.42	2042
2043	356,800				356,800	15,499,261,499	\$0.02	\$6.91	2043
2044	255,000				255,000	16,083,825,318	\$0.02	\$4.76	2044
2045	0				0	16,690,436,307	\$0.00	\$0.00	2045
Total	118,183,773	(4,576,605)	(8,145,175)	(1,003,309)	104,458,684				Total

Notes:

Legend:

Represents +/- 25% Change over previous year

Table 2 2026 Project List

City of New Berlin, WI

Projects	Purpose/Dept.	2026	Totals
HVAC UPGRADES & REPLACEMENT - FS#7	Building and Grounds	60,000	60,000
MOBILE VEHICLE BARRIERS	Streets-Equipment	260,000	260,000
ROADWAY REHABILITATION	Engineering-Streets	2,000,000	2,000,000
SUNNY SLOPE - Grange to College	Engineering-Streets	3,700,000	3,700,000
SIDEWALK REPAIR & MAINTENANCE	Engineering-Streets	50,000	50,000
PEDESTRIAN LIGHT POLE MAINTENANCE	Engineering-Improvements	50,000	50,000
MAPLE RIDGE PARK - PLAYGROUND	Community Development	600,000	600,000
MALONE PARK - INFRASTRUCTURE	Community Development	185,000	185,000
HICKORY GROVE - INTERNAL IMPROVEMENTS transfer switch	Community Development-Buildings	60,000	60,000
PUBLIC SAFETY BLDG - RELOCATE IMT	Community Development-Buildings	83,000	83,000
EMERGENCY MANAGEMENT - RADIO REPLACEMENTS	Community Development-Other	1,371,600	1,371,600
AMBULANCE	Fire	451,000	451,000
TENDER TANK	Fire	55,000	55,000
PUMPER-TENDER/ENGINE	Fire	994,000	994,000
BALLFIELD REPAIRS	Parks	117,000	117,000
CIP Costs		10,036,600	10,036,600

Table 3

Sources and Uses

City of New Berlin, WI

		2026	
		G.O. Notes	Levy Portion
CIP Projects			
Project Costs		10,036,600	10,036,600
Subtotal Project Costs		10,036,600	10,036,600
CIP Projects		10,036,600	10,036,600
Estimated Issuance Expenses			
Municipal Advisor		57,500	57,500
Bond Counsel		35,000	35,000
Disclosure Counsel		24,500	24,500
Rating Fee		24,500	24,500
Underwriter's Discount	10.00	101,300	101,300
Paying Agent		900	900
Subtotal Issuance Expenses		243,700	243,700
TOTAL TO BE FINANCED		10,280,300	10,280,300
Estimated Interest Earnings	3.00%	(150,549)	(150,549)
Assumed spend down (months)	6.00		
Rounding		249	249
NET ISSUE SIZE		10,130,000	10,130,000

Table 4

Allocation of Debt Service - 2026 G.O. Notes

City of New Berlin, WI

Year Ending	Levy Portion			
	Principal	Est. Rate ¹	Interest	Total
2026				0
2027	1,020,000	2.95%	395,329	1,415,329
2028	795,000	3.00%	298,388	1,093,388
2029	820,000	3.10%	273,753	1,093,753
2030	850,000	3.15%	247,655	1,097,655
2031	875,000	3.25%	220,049	1,095,049
2032	945,000	3.35%	190,001	1,135,001
2033	970,000	3.45%	157,440	1,127,440
2034	1,285,000	3.55%	117,899	1,402,899
2035	1,285,000	3.65%	71,639	1,356,639
2036	1,285,000	3.75%	24,094	1,309,094
Total	10,130,000		1,996,245	12,126,245

Year Ending	Totals		
	Principal (6/1)	Interest	Total
2026	0	0	0
2027	1,020,000	395,329	1,415,329
2028	795,000	298,388	1,093,388
2029	820,000	273,753	1,093,753
2030	850,000	247,655	1,097,655
2031	875,000	220,049	1,095,049
2032	945,000	190,001	1,135,001
2033	970,000	157,440	1,127,440
2034	1,285,000	117,899	1,402,899
2035	1,285,000	71,639	1,356,639
2036	1,285,000	24,094	1,309,094
Total	10,130,000	1,996,245	12,126,245

Notes:

1) Estimated Rate assumes current rates plus 50 basis points.

Table 5
Financing Plan Tax Impact

City of New Berlin, WI

Year Ending	Existing Debt		Proposed Debt										Year Ending
	Net Debt Service Levy	Equalized Value (TID OUT)	2026 G.O. Notes 10,130,000	2027 G.O. Notes 26,025,000	2028 G.O. Notes 25,955,000	2029 G.O. Notes 24,040,000	2030 G.O. Notes 13,720,000	Debt Service Levy		Taxes			
			Dated: 9/17/2026	Dated: 9/1/2027	Dated: 9/1/2028	Dated: 9/1/2029	Dated: 9/1/2030	Total Net Debt	Levy Change from Prior	Total Tax Rate for	Annual Taxes \$300,000	Annual Taxes new CIP debt	
			Total P&I	Total P&I	Total P&I	Total P&I	Total P&I	Service Levy	Year	Debt Service	of value	\$300,000 of value	
2026	13,567,309	8,259,983,700	2.95%-3.75%	4.00%	4.25%	4.50%	4.50%	13,567,309		\$1.64	\$493		2026
2027	13,160,552	8,571,513,873	1,415,329	0	0	0	0	14,575,881	1,008,573	\$1.70	\$510	\$50	2027
2028	12,248,411	8,894,793,591	1,093,388	2,237,150	0	0	0	15,578,948	1,003,067	\$1.75	\$525	\$112	2028
2029	11,780,705	9,230,265,994	1,093,753	2,325,800	1,378,859	0	0	16,579,117	1,000,169	\$1.80	\$539	\$156	2029
2030	10,156,883	9,578,390,938	1,097,655	3,080,300	1,895,875	1,352,250	0	17,582,963	1,003,846	\$1.84	\$551	\$233	2030
2031	9,671,988	9,939,645,620	1,095,049	3,076,600	2,292,100	1,678,075	771,750	18,585,561	1,002,599	\$1.87	\$561	\$269	2031
2032	6,372,500	10,314,525,236	1,135,001	3,064,600	2,860,481	2,906,713	1,594,900	17,934,195	(651,366)	\$1.74	\$522	\$336	2032
2033	5,222,928	10,703,543,659	1,127,440	3,073,900	2,858,669	3,056,038	1,647,650	16,986,624	(947,571)	\$1.59	\$476	\$330	2033
2034	4,051,313	11,107,234,141	1,402,899	3,069,200	2,858,350	3,067,488	1,744,775	16,194,024	(792,601)	\$1.46	\$437	\$328	2034
2035	3,351,356	11,526,150,049	1,356,639	3,080,300	2,859,313	3,064,213	1,737,400	15,449,220	(744,804)	\$1.34	\$402	\$315	2035
2036	2,326,188	11,960,865,619	1,309,094	3,081,900	2,851,556	3,056,438	1,727,775	14,352,950	(1,096,270)	\$1.20	\$360	\$302	2036
2037	2,263,950	12,411,976,743	0	3,044,800	2,849,975	3,053,938	1,725,675	12,938,338	(1,414,613)	\$1.04	\$313	\$258	2037
2038	2,200,744	12,880,101,790	0	451,800	2,844,356	3,056,263	1,720,875	10,274,038	(2,664,300)	\$0.80	\$239	\$188	2038
2039	2,135,481	13,365,882,451	0	449,200	1,082,738	3,009,200	1,732,925	8,409,544	(1,864,494)	\$0.63	\$189	\$141	2039
2040	2,069,131	13,869,984,616	0	451,100	1,081,500	549,225	1,726,713	5,877,669	(2,531,875)	\$0.42	\$127	\$82	2040
2041	2,001,813	14,393,099,293	0	452,400	1,078,988	547,688	222,000	4,302,888	(1,574,781)	\$0.30	\$90	\$48	2041
2042	1,265,634	14,935,943,550	0	448,200	1,075,200	545,475	215,250	3,549,759	(753,128)	\$0.24	\$71	\$46	2042
2043	356,800	15,499,261,499	0	448,500	1,079,925	547,475	208,500	2,641,200	(908,559)	\$0.17	\$51	\$44	2043
2044	255,000	16,083,825,318	0	448,200	1,082,950	543,688	201,750	2,531,588	(109,613)	\$0.16	\$47	\$42	2044
2045	0	16,690,436,307	0	447,300	1,084,275	544,113	195,000	2,270,688	(260,900)	\$0.14	\$41	\$41	2045
2046	0	17,319,925,988	0	445,800	1,093,688	543,638	188,250	2,271,375	688	\$0.13	\$39	\$39	2046
2047	0	17,973,157,246	0	443,700	1,091,188	542,263	181,500	2,258,650	(12,725)	\$0.13	\$38	\$38	2047
2048	0	18,651,025,506	0	0	1,189,756	544,875	174,750	1,909,381	(349,269)	\$0.10	\$31	\$31	2048
2049	0	19,354,459,969	0	0	0	531,700	168,000	699,700	(1,209,681)	\$0.04	\$11	\$11	2049
2050	0	20,084,424,880	0	0	0	0	332,313	332,313	(367,388)	\$0.02	\$5	\$5	2050
2051	0	20,841,920,848	0	0	0	0	0	0	(332,313)	\$0.00	\$0	\$0	2051
Total	104,458,684		12,126,245	33,620,750	36,489,741	32,740,750	18,217,750	237,653,920			3,444	Total	

Notes:

Table 6**General Obligation Debt Capacity Analysis - Impact of Financing Plan***City of New Berlin, WI*

Existing Debt					Proposed Debt			
Year Ending	Projected Equalized Value (TID IN)	Debt Limit	Existing Principal Outstanding	% of Limit	Combined Principal Existing & Proposed	% of Limit	Residual Capacity	Year Ending
2025	8,404,437,700	420,221,885	99,145,000	23.59%	\$99,145,000	23.59%	\$321,076,885	2025
2026	8,735,256,032	436,762,802	87,010,000	19.92%	\$97,140,000	22.24%	\$339,622,802	2026
2027	9,079,096,147	453,954,807	75,200,000	16.57%	\$110,335,000	24.31%	\$343,619,807	2027
2028	9,436,470,613	471,823,531	64,015,000	13.57%	\$123,355,000	26.14%	\$348,468,531	2028
2029	9,807,912,175	490,395,609	52,940,000	10.80%	\$134,150,000	27.36%	\$356,245,609	2029
2030	10,193,974,546	509,698,727	43,175,000	8.47%	\$134,270,000	26.34%	\$375,428,727	2030

Resolution No. 2026-13

RESOLUTION PROVIDING FOR THE SALE OF APPROXIMATELY
\$10,130,000 GENERAL OBLIGATION PROMISSORY NOTES, SERIES 2026A

WHEREAS the City of New Berlin, Waukesha County, Wisconsin (the "City") is presently in need of approximately \$10,130,000 for public purposes, including paying the cost of the City's 2026 capital improvement projects, including street, building and grounds, and park improvements and vehicles and equipment for various municipal departments (collectively, the "Project"); and

WHEREAS it is desirable to borrow said funds through the issuance of general obligation promissory notes pursuant to Chapter 67, Wisconsin Statutes.

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City that:

Section 1. Issuance of the Notes. The City shall issue its General Obligation Promissory Notes, Series 2026A in the approximate amount of \$10,130,000 (the "Notes") for the purposes above specified.

Section 2. Sale of the Notes. The Common Council hereby authorizes and directs that the Notes be offered for public sale. At a subsequent meeting, the Common Council shall consider such bids for the Notes as may have been received and take action thereon.

Section 3. Notice of Sale. The City Clerk (in consultation with Ehlers & Associates, Inc. ("Ehlers")) be and hereby is directed to cause notice of the sale of the Notes to be disseminated in such manner and at such times as the City Clerk may determine and to cause copies of a complete Notice of Sale and other pertinent data to be forwarded to interested bidders as the City Clerk may determine.

Section 4. Official Statement. The City Clerk (in consultation with Ehlers) shall cause an Official Statement to be prepared and distributed. The appropriate City officials shall determine when the Official Statement is final for purposes of Securities and Exchange Commission Rule 15c2-12 and shall certify said Official Statement, such certification to constitute full authorization of such Official Statement under this resolution.

Section 5. Reimbursement. The Common Council hereby officially declares its intent pursuant to Treasury Regulation Section 1.150-2 to reimburse any expenditures made in connection with the Project prior to the issuance of the Notes with the proceeds of the Notes in an amount not to exceed \$10,130,000.

Adopted, approved and recorded July 28, 2026.

David A. Ament
Mayor

ATTEST:

Rubina R. Medina
City Clerk

(SEAL)

REQUESTED ACTION STATEMENT

TO: Common Council

FROM: Alderman John Hopkins, District 1

RE: Requested Action Statement approving the transfer of remaining Capital Improvement Project (CIP) funds from the Lions Park Design Project to establish funding for the Gatewood Park Master Plan Project.

DATE: June 30, 2026

REQUESTED ACTION: Requested Action Statement for the approval of Resolution 2026-12 amending the 2026 Capital Improvement Projects Budget by transferring the remaining available balance from the Lions Park CIP budget to establish the Gatewood Park Master Plan Project and authorize the associated budget transfer.

FISCAL IMPACT: This budget amendment reallocates existing Capital Improvement Budget (CIP) funding and does not increase the overall adopted 2026 Capital Improvement Budget.

Funding will be provided through the transfer of the remaining available balance from the Lions Park Design Project, which is \$48,491.

SOURCE OF FUNDS: **Transfer From:**
Lions Park Pickleball Court Design
Account No. 04252900 61136 C2025

Transfer To:
Gatewood Park Master Plan
Account No. 04253000 61125 C2026

RATIONALE / BACKGROUND: The Lions Park Design Project is not anticipated to proceed at this time. As a result, the remaining appropriation for that project is available for reallocation. Is it recommended that the

remaining available balance be transferred to establish and provide the initial funding for the Gatewood Park Master Plan Project. The master plan will evaluate future park improvements, identify priorities, address accessibility and playground deficiencies, and phased implementation.

See attached 2026 CIP Request Narrative for the Gatewood Park Master Plan CIP project.

RESOLUTION 2026-12
A RESOLUTION AMENDING THE 2026 CAPITAL PROJECTS BUDGET

WHEREAS, the Lions Park Design Project is not anticipated to proceed at this time; and

WHEREAS, the remaining appropriation for the Lions Park Design Project is available for reallocation; and

WHEREAS, the Common Council desires to establish the Gatewood Park Master Plan Project to evaluate future park improvements, identify priorities, address accessibility and playground deficiencies, and provide a design and framework for future park improvements; and

WHEREAS, Alderman John Hopkins, District 1 recommends transferring the remaining available balance from the Lions Park Design Project to establish the Gatewood Park Master Plan Project without increasing the overall 2026 Capital Improvements Budget.

NOW, THEREFORE, BE IT RESOLVED, by the Common Council of the City of New Berlin that the 2026 Capital Projects Budget be amended as follows:

TRANSFER FROM

Lions Park Pickleball Court Design	04252900	61136	C2025	\$48,491
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TRANSFER TO

Gatewood Park Master Plan	04253000	61125	C2026	\$48,491
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BE IT FURTHER RESOLVED that the City Clerk is hereby directed to publish this resolution in the Waukesha County NOW within 10 days of adoption by the Common Council.

RESOLUTION ADOPTED by the New Berlin Common Council on this 28th day of July 2026.

David Ament, Mayor

Countersigned:

Rubina Medina, City Clerk

CAPITAL IMPROVEMENT PROJECT REQUEST

(A) Type of Project: ☒ New ☐ Expanded ☐ Replacement/Maintenance	(B) Project #: <u>2</u> Dept Priority #: <u>2</u> Date Submitted: <u>10/13/2025</u> Fund #: _____ Organization #: <u>530</u>																																				
(C) Submitted By: <u>Community Development</u> (Department) Prepared By: <u>Kristen Hogan, Principal Planner</u>	(D) Previous Action: ☒ New ☐ Revise ☐ Resubmittal																																				
(E) Project Title: <u>Gatewood Park Master Plan</u> ATTACH PROJECT SUMMARY AND DOCUMENTATION																																					
(F) Estimated Capital Costs: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%;">ITEM</th> <th style="width: 12.5%;">2026</th> <th style="width: 12.5%;">2027</th> <th style="width: 12.5%;">2028</th> <th style="width: 12.5%;">2029</th> <th style="width: 12.5%;">2030</th> </tr> </thead> <tbody> <tr> <td>Land Acquisition</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Equipment</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Construction</td> <td>\$60,000</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Other (Design & Legal)</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Capital Costs</td> <td>\$60,000</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		ITEM	2026	2027	2028	2029	2030	Land Acquisition						Equipment						Construction	\$60,000					Other (Design & Legal)						Total Capital Costs	\$60,000				
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Grants/Other																																					
(I) Are new personnel involved in this request? ☐ Yes ☒ No																																					
(J) Disposition of Previous Facility:																																					
(K) Mayor's Comments:																																					

CITY OF NEW BERLIN CAPITAL PROJECT SUMMARY	
Project Title: Gatewood Park Master Plan	Department: DCD/Planning

(A)Project Scope and Description:

This project consists of developing a master park plan within Gatewood Park. Design work would be completed in year 1 of the program, followed by construction in year 2 of the program.

(B)Location:

Gatewood Park - 14201 W. Kostner Lane

(C)Analysis of Need:

By providing equitable access to playgrounds where kids can learn, play and grow, playgrounds foster the development of children of all ages and abilities by:

- Physical: Providing a space for physical activity helps to build strength and coordination.
- Social and emotional: Serves as a setting for learning cooperation, conflict resolution, and empathy.
- Cognitive: Playgrounds encourage creativity, problem-solving, and self-confidence.
- Community: Contributes to community building by providing a shared space for families to gather and connect.

The City's insurance carrier, CVMIC, has inspected the equipment on a regular basis and identified several safety violations that warrant attention. The following is a summary of the outstanding safety issues with the playground that are outlined in the 2022 CIVMC Playground Inspection Report:

- Maintenance. Inspections alone do not constitute a comprehensive maintenance program. Any problems found during the inspection should be noted and fixed as soon as possible. All repairs and replacements of equipment parts should be completed following the manufacturer's instructions. CPSC 4.2. Monitor plastic climbing components on this playground that have been damaged by UV radiation.
- Entrapment. Head and Neck Entrapment - Public playground equipment shall be designed and constructed or assembled so that any accessible opening shall meet the following performance requirements to reduce the risk of accidental head or neck entrapment by either a head-first or feet-first entry into the opening. ASTM-F1487 6.1. This piece of equipment presents a head entrapment hazard. Both head entrapments on the bridge should be fixed.

The following is a summary of the outstanding issues with the playground and trails that are outlined in the 2018 ADA study completed by MSA:

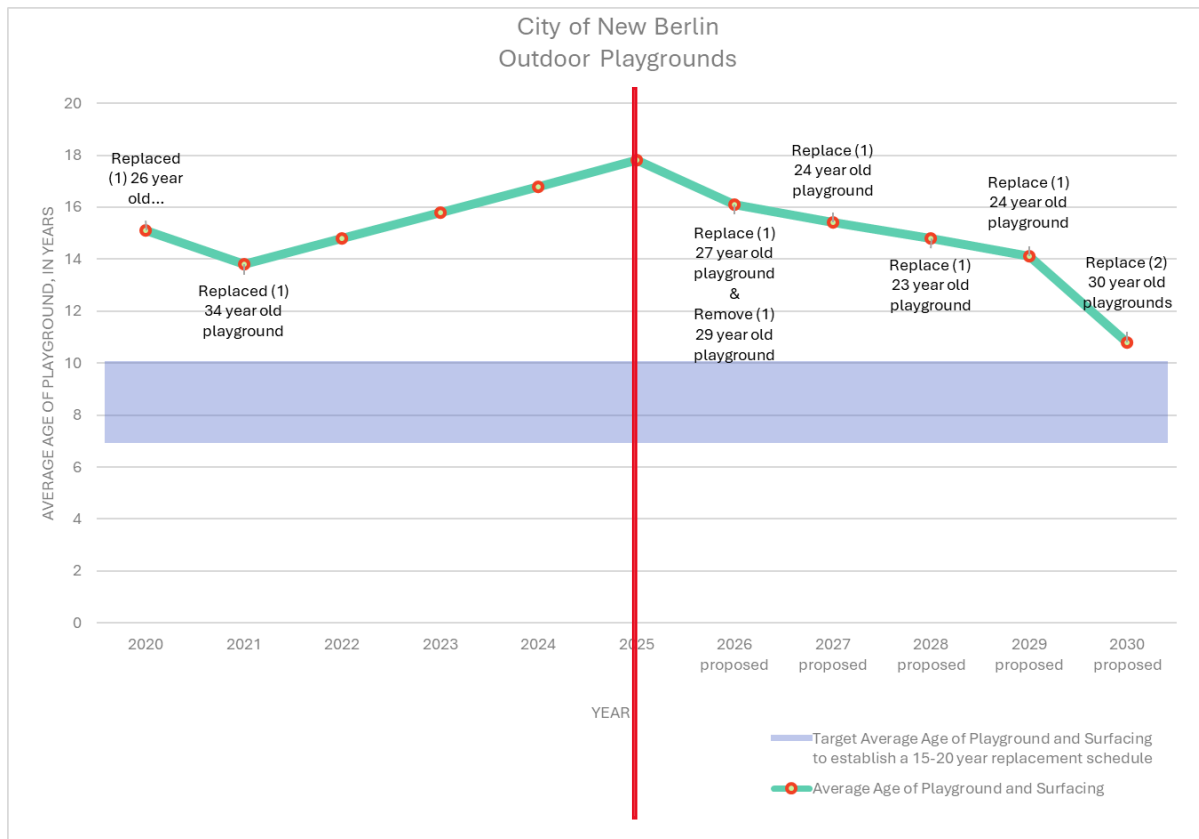
- No accessible parking identified. *No off-street parking provided (not a deficiency in itself). Identify and mark on-street parking.
- No accessible route from on-street parking to soccer field. Add accessible route. (~150 LF)
- Access route from on-street parking to main park areas: Narrows to less than 60" (gravel overgrown by grass/weeds). Replace or top dress gravel.

- Access route from on-street parking to main park areas: Soft and saturated in spots. Replace or top dress gravel.
- Access route from on-street parking to main park areas: Transition from street is 6%, greater than 1:20/5% max. Regrade and replace pavement and install warning field.
- Accessible route does not extend to playground, shelter, basketball court, or athletic fields. Install accessible route to all elements: material can be compacted gravel, asphalt or concrete. (~350 LF)
- Pavement under shelters has settled and gaps (1.5") and lips (1") exist greater than allowable maximum (½" gaps and 1/4" lips). Replace pavement or raise pavement and fill gaps with appropriate sealant.
- Turn around space for swing is 48", 60" is required minimum. Extend turning area to 60".
- Bench seat height is above standard. Footings are exposed. Raise surfacing or lower bench.
- Engineered wood fiber surfacing is soft in spots. Accessible to most areas but needs maintenance/replacement. Replace surfacing.
- No grills are on an accessible route. Grills are bent/off plumb. Extend route to minimum of one grill. (~100 LF)
- No picnic tables are on an accessible route. Add route to at least 25% of tables in park. (~100 LF)
- No tables are wheelchair accessible. Replace or add at least 1 table with wheel chair accessible type.
- Basketball court surface is worn and holds water in spots.
- Engineered wood fiber surface is soft and uneven. Replace surface and maintain to ASTM F1951-99. (~2,600 SF).
- Spring riders are aging. Consider replacement.
- Route from parking area to site features is not accessible. Width is less than 60". Widen pavement and top dress.
- Route from parking area to site features is not accessible. Surface is worn and grass/weed covered in spots. Replace/add gravel.
- No accessible route exists to connect basketball court, athletic field, or shelter. Add accessible route. (~350 LF)

Project selection is coordinated with other proposed park redevelopment plans and is ranked based upon the number of outstanding issues in that park.

(D) Alternatives:

The expected lifespan for outdoor playground equipment and surfacing is 15-20 years. Once a playground has exceeded its useful life, it becomes cost prohibitive to perform maintenance, procure parts and make repairs, resulting in the playground no longer meeting the expectations of the residents who use the park. Currently, 40% of the City's playgrounds have exceeded their useful life and require a full replacement. To establish a 15-to-20-year replacement schedule, it is recommended that one playground should be replaced annually.



(E) Ongoing Operating Costs:

Once the playground is replaced, routine park maintenance will be needed over the next 5-10 years. No major operating implications are anticipated.



DATE: July 27, 2026

TO: Common Council

FROM: Mayor Ament
Katie Roth, Recreation Manager
Eric Snodgrass, Assistant Recreation Manager
Melissa Beck, Human Resource Director

REQUESTED:

Recommendation to create a new part-time position Recreation Event Support to allow the Recreation Department to fulfill contractual obligations as outlined in the New Berlin Recreation Court Rental Rates, Policies, and Procedures.

FISCAL IMPACT:

Funding for the proposed position is accounted for in the fees that will be paid by the organization renting the court or space.

RATIONALE:

As part of the strategic plan, the recreation department has increased usage of the recreation facilities for facility rentals, athletic tournaments, and special events. These events mainly occur outside of normal operating hours, thus making it difficult for the full-time staff to meet the needs of the events.

To support the needs of the events, the Recreation Department has created policies and procedures which incorporate fees to accommodate necessary staffing to support these events. The addition of the Recreation Event Support staffing position will allow the Recreation Department to more efficiently manage facility rentals and tournaments during evenings, weekends, and other non-standard hours while maintaining appropriate oversight of City facilities.

This position is a seasonal part-time position which will be managed similarly to other seasonal part-time recreation positions. The department will look to hire a pool of staff who are willing and able to commit to working throughout the year based on facility demands for special events. This provides scheduling flexibility, ensures adequate coverage for events and tournaments, and supports the continued growth of the use of the facility.

Attached: Recreation Support Staff Job description
Court Rental Rates, Policies, and Procedures



POSTION: Recreation Event Support

LOCATION/DEPARTMENT: Recreation

SUPERVISOR: Recreation Assistant Manager

EMPLOYMENT STATUS: Non-
Exempt/PT/ Seasonal

SALARY RANGE: \$15.00 per hour

DIRECT REPORTS: None

POSITION SUMMARY

Under the direction of the Assistant Recreation Manager, the Recreation Event Support staff will provide required support during special events. This position will oversee assigned special events to ensure City facilities remain properly supervised, safe and well-maintained during the event. Employees may be assigned to work at any Recreation Department facility, park, or program location, based on special event needs.

ESSENTIAL DUTIES

- Provide general department information to participants, parents, and community members.
- Greet visitors, respond to questions, and direct inquiries to the appropriate staff member.
- Check in participants and visitors, verify attendance for permitted events, and direct individuals to the appropriate program or activity location.
- Assist with registrations, memberships, permits, facility rentals, and payments using the City's ActiveNet registration software and other computer systems as needed for assigned special events.
- Process payments, balance cash drawers, and follow established cash handling procedures as needed for assigned special events.
- Monitor activity throughout Department facilities and enforce facility rules and participant expectations to promote a safe, welcoming, and inclusive environment.
- Conduct routine facility inspections during events to identify safety hazards, cleanliness concerns, or maintenance issues and report them appropriately.
- Open, close, and secure Recreation Department facilities, for assigned events.
- Assist with program and event set-up and tear-down, including arranging tables, chairs, sports equipment (Pickleball, Volleyball, Basketball, etc.), and other program materials.
- Assist in maintaining clean and safe facilities by addressing spills, bodily fluids, and other hazards, or notifying appropriate facility staff as needed.
- Assist with snow removal and salting of program walkways and entrances, when assigned.
- Communicate program information or needs to the participants, parents, and/or community members.
- Administer and/or assist with basic First Aid and completion and submission of accident and incident report forms.
- Serve as a point of contact during emergencies, including medical incidents, severe weather, fire, security concerns, and facility evacuations.
- Communicate incidents, injuries, operational concerns, and participant issues to the Recreation Assistant Manager or appropriate department supervisor.

- Exercise sound judgment, facilitate conflict resolution, and independently resolve routine issues within the scope of the position.
- Attend and participate in required department training, in-services, and staff meetings.
- Maintain a professional appearance, positive attitude, and courteous demeanor while representing the Recreation Department.
- Perform other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

- Ability to communicate effectively and professionally with participants, staff, and the public.
- Ability to work evenings, weekends and special events as assigned.
- Ability to learn to operate point-of-sale systems, registration software, telephones, computers, and other office equipment.
- Basic computer proficiency.

MINIMUM QUALIFICATIONS

- High school diploma or equivalent preferred.
 - Previous experience in event management, customer service, recreation, office support, or a related field is preferred.
 - Current First Aid, CPR, and AED certifications preferred or ability to obtain within 6 months of hire.
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PHYSICAL REQUIREMENTS

- Frequently required to stand and walk for extended periods.
- Frequently bend, stoop, kneel, reach, and climb stairs.
- Occasionally lift, carry, push, and pull up to 50 pounds.
- Frequently use hands and fingers to operate computers, telephones, point-of-sale systems, and other office equipment.

ENVIRONMENTAL REQUIREMENTS

- Work is performed in recreation facilities, parks, and outdoor event locations and may include exposure to varying weather conditions, moderate noise levels and other conditions associated with recreation programs and special events.

SENSORY REQUIREMENTS

- The task requires close visual acuity to perform various activities.
- The task requires oral communications ability.
- The task requires sound perception.

This description has been prepared to assist in evaluating various classes of responsibilities, skills, and working conditions. It indicates the kinds of tasks and levels of work difficulty required of positions given this classification. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or modify the right of any supervisor to assign, direct, and control the work of employees under supervision. Nothing contained herein is intended or shall be construed to create or constitute a contract of employment between any employee and group of employees and the City. The City retains and reserves any and all rights to change, modify, amend, add to or delete from any section of this document as it deems, in its judgement, to be proper.

NON-DISCRIMINATION AND EQUAL EMPLOYMENT OPPORTUNITY

The City of New Berlin does not discriminate on the basis of the protected classes of age, race, color, creed, religion, disability, handicap, marital or parental status, sex, sexual orientation, gender identity national original,

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.