

DATE: February 17, 2010

TO: Pewaukee Merger Advisory Committee

FROM: Ruekert/Mielke
Christy Cramer

Boardman Law Firm
Lawrie Kobza

RE: Status of Contracts for Consolidation Planning Services

The purpose of this memo is to report on the status of our contracts for services related to the potential consolidation of the City and Village. With the extension of the timeline for this process, we would like to update the Committee regarding the amount of remaining budget for our contracts in order to help with prioritizing your work as you move forward. Two of those contracts are still in process—one for services related to seeking special legislation and one for services related to development of the consolidation plan and public education materials.

The services that we have provided to date with respect to these items include:

Special Legislation:

- Prepared proposed draft of consolidation legislation and subsequent suggested revisions
- Provided research on constitutionality of proposed consolidation legislation
- Met with potential sponsors of consolidation legislation
- Met with groups that would support the legislation, such as the Local Government Institute and the Alliance of Cities
- Met with the Legislative Council staff regarding consolidation legislation
- Met with the Legislative Reference Bureau personnel drafting the consolidation legislation
- Met and worked with the League of Municipalities lobbyist on consolidation legislation

Consolidation Plan and Public Education

- Researched various options and legal issues related to the consolidation ordinance and plan
- Conducted an all-day working session with the Committee to receive direction for the drafting of the consolidation ordinance
- Drafted and revised the consolidation ordinance at the Committee's direction
- Reviewed the updated 2010 merged General Government operations budget prepared by the City and Village Administrators
- Reviewed and analyzed updated financial information for the City and Village General Fund and Utility Funds
- Developed a preliminary proposed methodology and plan for improving the distribution of the financial benefits of consolidation

- Updated the projections of utility rate and tax rate impacts for City and Village ratepayers and taxpayers based on the preliminary plan
- Prepared a draft report on the preliminary plan and potential tax rate and utility rate impacts
- Assisted with and attended 7 meetings of the Merger Advisory Committee to present the above documents and information and receive feedback and direction
- Assisted with and attended a joint meeting of the City Council and Village Board to present the preliminary plan and ordinance and receive feedback
- Attended two meetings with the public education sub-committee of the Merger Advisory Committee to discuss the types and timing of public information media desired by the Committee
- Assisted with preparing content for two newsletters for residents regarding the status of the merger process
- Assisted with developing frequently asked questions for posting on the Merger Information website
- Coordinated with SEWRPC staff to post documents provided to the Merger Advisory Committee on the Merger Information website
- Worked with Zeppos & Associates, City and Village staff and SEWRPC staff to respond to a variety of questions from Pewaukee residents

The timeline that we provided in October was predicated on the City Council and Village Board taking action on the consolidation ordinance no later than mid-February and holding a referendum in both communities on the April 6 election. We have now completed the time period and the number of meetings with the Merger Advisory Committee to prepare the consolidation plan that were anticipated in our scope of services. The items that were included in our scope of services that are not yet completed include: the preparation of a list of transition tasks and estimated costs; preparation of a resolution for the City Council and Village Board to adopt the Consolidation Ordinance; help organize, arrange and coordinate two public informational town hall meetings; continued assistance with responding to citizen questions, developing factually accurate information and corrections for inaccurate statements; and continued assistance the preparation of additional informational materials.

As of February 15, 2010, the amounts remaining for each of these efforts is as follows:

	Total Budget	Amount Remaining
Special Legislation		
Boardman Law Firm	\$28,000	\$5,900
Ruekert/Mielke	<u>\$20,000</u>	<u>\$1,800</u>
Subtotal	\$48,000	\$7,700
Consolidation Plan and Agreement		
Ruekert/Mielke	\$55,000	\$7,100
Boardman Law Firm	<u>\$43,000</u>	<u>\$19,000</u>
Subtotal	\$98,000	\$26,100
Public Education (excluding Zeppos & Associates)		
Ruekert/Mielke	\$8,000	\$4,400
Boardman Law Firm	<u>\$5,000</u>	<u>\$5,000</u>
Subtotal	\$13,000	\$9,400
Total	\$159,000	\$43,200

We hope that this is helpful to the Committee as you consider how to prioritize the Committee's work going forward. We appreciate the opportunity to work with the Committee and we will be happy to answer any questions you may have regarding this information.



ZEPPOS & ASSOCIATES
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MEMORANDUM

To: Pewaukee Merger Advisory Committee

From: John Gardner
Evan N. Zeppos, APR

Re: Public Education Efforts

With a calendar and timeline shift that would put a possible merger vote in June rather than April, we thought it was a good time to update you on public education efforts to date. We appreciate the opportunity to assist the Merger Advisory Committee in its efforts to educate the public and provide factual information on a possible merger of the City and Village of Pewaukee.

As you know, it's our job to prepare and help distribute fact-based and accurate information for public education purposes. We take our role in educating the public seriously. In the past, we've conducted public education efforts related to public schools, local municipalities and other government entities, and each time, our role was to take a neutral position as materials were developed and distributed.

That same principle applies to this particular assignment. Over the past two months, we have developed a variety of accurate and face-based educational resources aimed at helping the public on a possible merger. We believe residents and property owners in the Village and City play the most important role in this process since they are the ones who will ultimately decide whether the two municipalities should merge. As such, it's equally important they have factual resources to help them form their views.

The public education efforts we have conducted to date include the following:

- Creating a public education plan outlining specific efforts and a timeline for developing and distributing fact-based resources related to a possible merger.
- Developing two educational newsletters containing commonly asked questions from citizens and important information related to how and where residents can obtain additional resources, learn about upcoming meeting dates, and receive updates.
- Adding to the Pewaukee Merger Study Web site, including more information for interested parties that is easily accessible.
- Working with SEWRPC to revise/update Web content with the latest news regarding merger discussions.
- Assisting in the development of an e-mail database of citizens to distribute information quickly and inexpensively to residents.
- Developing regular e-mail updates to those who requested to receive communication electronically.



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- Developing and updating the Pewaukee Merger Information Facebook page as an additional means for residents to quickly access information related to merger discussions.
- Developing a news release highlighting the availability of public education resources. This has yet to be approved and distributed.
- Working with Ruckert/Mielke and City and Village administrators to respond in a timely manner to questions submitted via the Web site and e-mails to SEWRPC.

In addition to these efforts, we have attended Merger Advisory Committee and Public Education Sub-Committee meetings, assisted in editing presentation materials, and reviewed additional information provided to the Merger Advisory Committee for discussion and action.

It's important to point out that, throughout the development and distribution of educational materials and resources, we have taken our direction from the Merger Advisory Committee and Public Education Sub-Committee, which has approved all materials. Our work has been checked and rechecked before gaining approval for public distribution. In particular, the content of the recently mailed newsletter was unanimously approved by the Merger Advisory Committee.

Everyone has a right to an opinion, and with an important matter like a potential merger, it's inevitable that some would claim information is biased. That's understandable. However, we take seriously our job to remain neutral, fair and accurate. There are going to be hard and fast opinions from both sides of the issue, pro or con, yet it's very important for us to take no position whatsoever. We believe that is reflected in the newsletter and all of the other materials developed.

In summary, we're on track with our plan and continue to take no position and present the information available in a fair and unbiased way. There are some questions raised by City and Village residents that cannot be addressed at this time because decisions will be made in the future by others. However, we will continue to work with the Advisory Committee and Ruckert/Mielke to see to it that all questions are answered when factual information is available to address them.

Again, we appreciate the opportunity to assist the committee, and we look forward to continuing our efforts as discussions move toward a possible referendum vote. Thanks again, and please don't hesitate to contact us with any questions.

Note: As of February 17, estimated contracted funds spent to date total \$22,000 from the total authorized amount of \$38,000. This is consistent with the original plan and timeline.