



COMMITTEE OF THE WHOLE AGENDA
Tuesday, August 2, 2022 at 6:00 p.m.
Adel City Hall, 301 S. 10th Street, Adel, IA 50003

NEW BUSINESS

- a) July 5, 2022 Committee of the Whole Meeting Minutes
- b) New Hope Church – East Annex Sanitary Sewer Connection Fee
- c) Adel Police Department Hiring Process – Buying Out Training Costs
- d) Potential Southbridge PUD Modifications for Assisted Living Facility Project
- e) Employee Retention & Attraction Follow-Up
- f) Inflation Impacts & Potential Changes to Policies

OTHER BUSINESS

ADJOURNMENT

Committee of the Whole
Tuesday, July 5, 2022 – Meeting Minutes

The City of Adel’s Committee of the Whole met in the council chambers at Adel City Hall. McAdon called the meeting to order at 6:00 p.m. Members present: Christensen, McAdon, Miller, Ockerman, and Selby. Others present: City Administrator Brown, Public Works Director Overton, Parks & Recreation Director Schenck, Police Chief Shepherd, and McClure rep. Gary Brons.

NEW BUSINESS

a) May 3, 2022 Committee of the Whole Meeting Minutes

b) June 7, 2022 Committee of the Whole Meeting Minutes

Motion by Miller, seconded by Selby, to approve both sets of minutes. Motion carried unanimously.

c) Well #7 Using Remaining USDA-RD Grant Funds – McClure Contract Amendment

Brown stated that the City could have approximately \$800,000 of USDA-RD grant funds remaining.

Christensen motioned, seconded by Ockerman, to recommend this contract. Motion carried unanimously.

d) Island Park Camping / Soccer Lease Agreement Amendments

Brown stated that City staff has been unable to find a time for RCM Campground Investments and the ADM Soccer Club to meet. Miller stated that the campground has many “For Campers Only” signs, which makes it challenging for non-camping park attendees. Schenck stated he held a three-hour meeting with both parties in the spring but could not resolve the parking issues.

Miller asked about the police involvement. Shepherd stated that the parties contact private towing companies. Schenck noted that a map that was included in the original proposal was intended for maintenance and mowing, not for boundaries. Miller suggested removing the garbage costs from RCM’s lease rate. Brown stated that the utility bills could be transferred to RCM if desired. Overton noted that a water meter could cost \$25,000 to install.

Ockerman motioned, seconded by Selby, to recommend the lease amendments as originally proposed in June. Motion carried unanimously.

e) Ash Trees

Schenck provided a draft request for proposals to remove dozens of City ash trees infected with the emerald ash borer. The budget is \$100,000, though the City’s Street Department has already removed 40. Christensen suggested a variety of public communications to alert property owners. McAdon suggested against allowing residents to opt-out. Ockerman suggested against replanting street trees. Schenck noted that residents have been calling about their private ash trees.

f) Fuller’s Gas Station for Local Fuel and Kum & Go for Traveling Fuel

Brown stated that City Clerk Carrie Erickson and Finance Director Brittany Sandquist have researched procuring the City’s fuel from Fuller’s to save money. The committee’s consensus was to move forward.

OTHER BUSINESS

Miller asked about the venue of discussing the employee retention items. The committee had no preference.

Brown stated that New Hope Church may request relief on a potential \$80,000 East Annex Connection Fee District charge for its new addition. Brons noted that the ordinance addressed single family homes differently than commercial areas. The committee’s consensus was to wait until a formal request has been received.

ADJOURNMENT – 7:14 p.m.

Respectfully submitted: Anthony Brown, City Administrator

/ *...formerly*
DESIGN ALLIANCE

City of Adel
301 S 10th St.
Adel, Iowa 50003

Re: New Hope Addition Phase III

Dear Council,

My name is Jerry Purdy, AIA and I am the architect of record for the New Hope church facilities. I have been fortunate enough to have worked with the church for Phase I, Phase II, and Phase III. I am contacting you on their behalf.

The purpose of this letter is to request consideration of reducing the east annex connection sewer fees for the Phase III New Hope church addition. It is my understanding from city staff, the fees for constructing the Phase III addition are as follows:

Building Permit Fee:	\$10,685.75	(not unusual)
Plan Review Fee:	\$ 6,945.74	(typically in building permit fee)
Sewer connection Fee:	\$ 1,000.00	(not unusual)
East Annexation Fee:	\$ 78,817.54	(purpose for this letter)
Total:	\$97,449.03	

The amounts for the first three items are not unusual for building projects of this nature. Although typically the plan review fee is part of the building permit. The East annexation fee is extremely high and detrimental to the project.

The planning process to date is important to note as this item is not a new issue, but the cost associated with the connection is.

Approximately two years ago we started on the design of this significant addition to accommodate the church's growing membership. The plan has always been to add facilities to the original church worship space as the membership grew and finances permitted. Phase I was constructed in 2009 at the costs of \$1.3 M. and Phase II was completed in 2013 at the costs of \$572,182.

Phase I construction included the use of a septic system for sewer service. It was designed to handle the increase building size through Phase I, II, and now Phase III. At the start of this project, we looked at the acceptability of connecting into the septic system. A review of the system and conversations with the building department noted this may not be the route to go given codes have changed over the years and recalculating the system capacity may fall short of the new load requirements per code. We talked about the possibility of expanding the septic system and or creating a separate system just for the addition. This was not as favorable as other possibilities.

We understood a new sewer line was planned for East Adel which could serve this area, the new Dallas County Law Enforcement Center, the significant housing growth, and the Ortonville area expansion. The line was to run on the south side of New Hope site approximately 265 l. ft. at its closest point (see

attachment Aerial site plan). The line would be on the neighboring Charles Kreager property and would require easements. The terrain was not favorable to the church project as the area is heavily timbered, crosses a rather deep ravine, and fields still under agricultural use. We started to explore this option further with a conversation with the building department noting our concerns about the cost of doing this solution (not even thinking about fees yet). Steve Nichols, code compliance officer, suggested we could start a conversation with the neighboring developer as plat filings have started with that project.

The developer, Eagle Vista II, was contacted and a conversation started. We received the plat with the location of proposed site lot layout, particularly one that laid closer to the church property. A deal was made to create an easement that would allow the church to hook up to a sewer line proposed for the street cul-de-sac that serves those properties. The church invested over \$30,000 in costs for engineering, easement costs, and legal fees to allow that to happen.

Construction documents were created with contracts signed to proceed with that solution. The contractor then applied for building permit and the sewer connection issue was brought to our attention.

It is my understanding the Adel City Ordinance section 99A.04 EAST ANNEX SANITARY SEWER CONNECTION FEE DISTRICT states the following regarding this topic:

4. Exception Within District. The established connection fee shall not apply to the following properties within the benefitted district:
 - A. Pursuant to the 28E Agreement between the City of Adel and Dallas County, dated March 5, 2018, the property on which the county's public safety facility has been built is exempted from paying the connection fee (Parcel Nos. 1127400013 & 1127400012);
 - B. Pursuant to the 28E Agreement between the City of Adel and Dallas County, dated March 5, 2018, properties that are currently being served by the county's Ortonville sewer collection system are exempted from paying the connection fee and Dallas County will instead be responsible for the connection fees associated with these properties.
 - C. The connection fee shall not apply to any properties within the East Annex Sanitary Sewer Connection Fee District which do not use or derive benefit from any sewer facilities constructed for the East Annex Sanitary Sewer Connection Fee District.

The church believes precedence has been established with the properties noted above in paragraph's A and B. A different way of calculating needs to be created given this site was not included in the exceptions and should have been given the usage. The proposed rate for the church has been calculated at the rate of \$ 6,211 per acre and, with 12.689 acres, the fee becomes \$ 78,817.54.

The church does not believe they fall into the category for typical development properties. To pay based on cost per acre with no intention of developing additional parcels places an undue hardship on the church. The church has no plans to develop the property to sale lots. The site was purchased with the intentions of a permanent New Hope home and room to grow and expand.

A conversation with the city staff should be able to create an appropriate fee schedule. Perhaps a calculation based on the existing footprint, addition proposed, and support area can define a new site plan area to base the calculation on. Or simply define a fair rate and move forward.

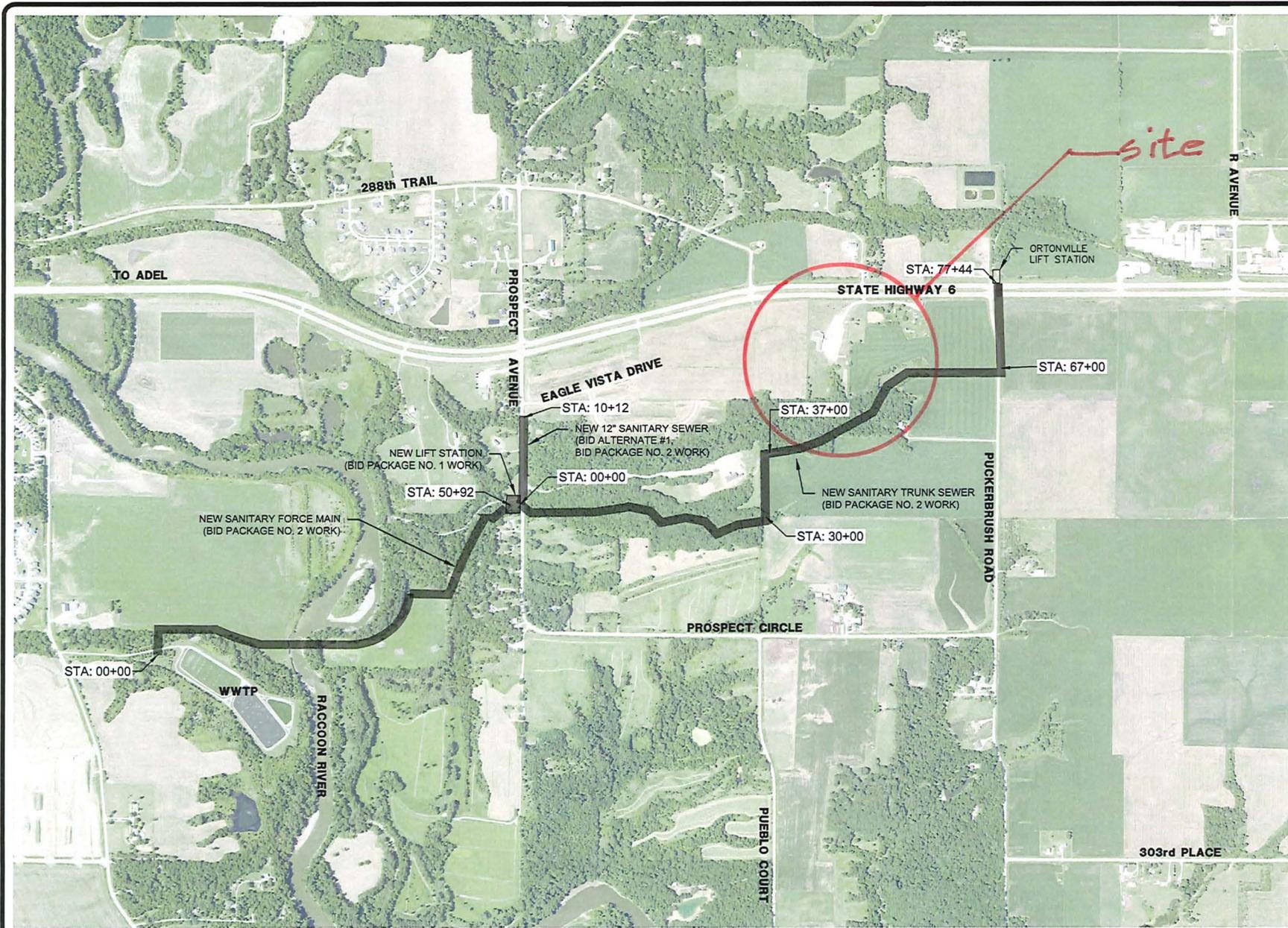
If you have any questions or clarifications, please feel free to call. New Hope Church would appreciate the opportunity to work with you on this significant issue.

Sincerely,



FARNSWORTH GROUP, INC.

Jerry Purdy, AIA, Principal

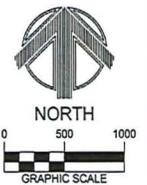


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 Clive, Iowa 50225
 515-964-1229
 fax 515-964-2232

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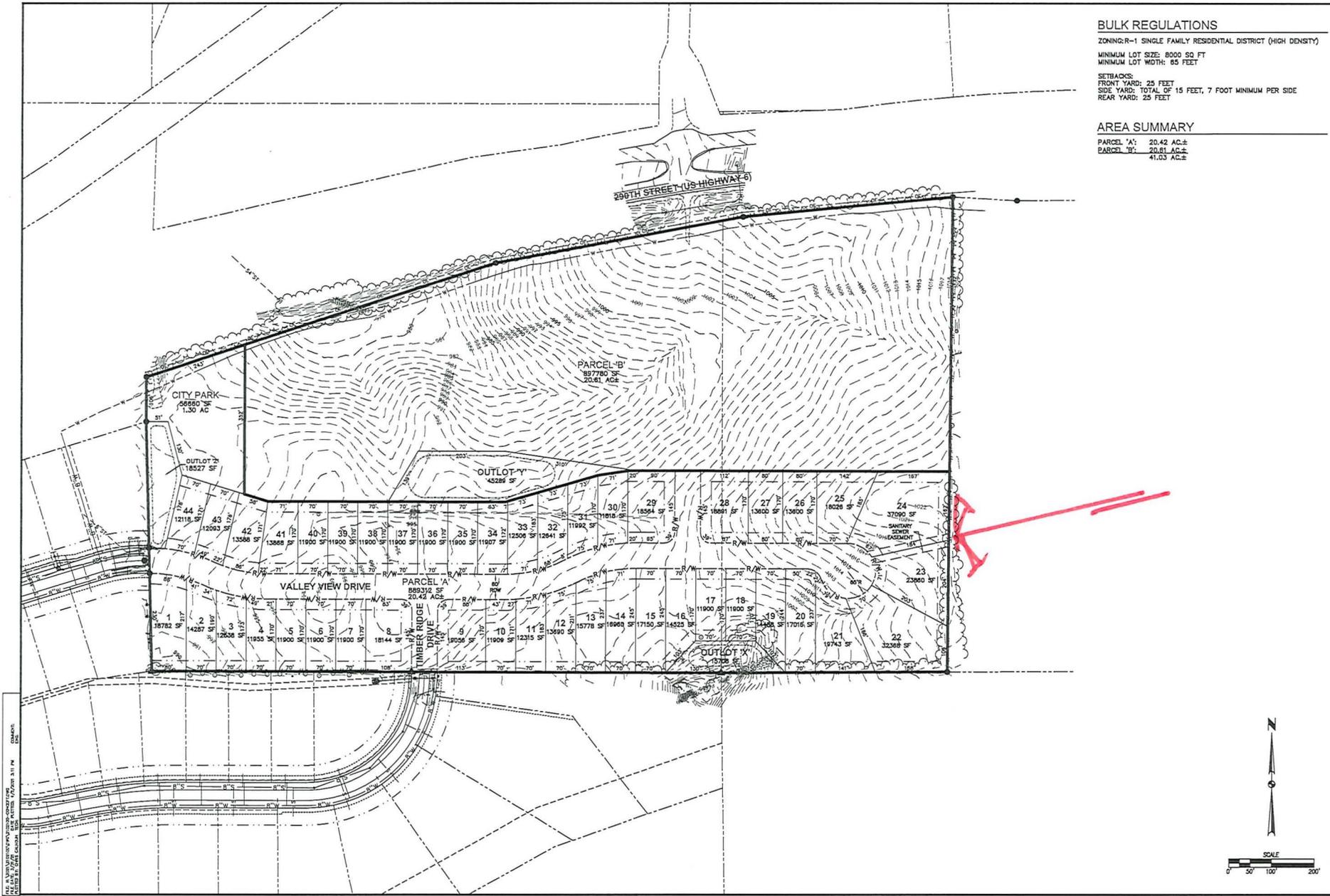
PROJECT
 LOCATION
 MAP



**EAST ANNEX SANITARY
 UTILITY IMPROVEMENTS
 BID PACKAGE NO. 2**
 ADEL, IOWA
 20317006-00
 OCTOBER 2018

REVISIONS:

ENGINEER AMP	DRAWN BY KJC
CHECKED BY TJH	FIELD BOOK NO. -
DRAWING NO. A.03	SHEET NO. 03 / 75



BULK REGULATIONS
 ZONING: R-1 SINGLE FAMILY RESIDENTIAL DISTRICT (HIGH DENSITY)
 MINIMUM LOT SIZE: 8000 SQ FT
 MINIMUM LOT WIDTH: 85 FEET
 SETBACKS:
 FRONT YARD: 25 FEET
 SIDE YARD: TOTAL OF 15 FEET, 7 FOOT MINIMUM PER SIDE
 REAR YARD: 25 FEET

AREA SUMMARY
 PARCEL 'A': 20.42 AC.±
 PARCEL 'B': 20.81 AC.±
 41.03 AC.±

DATE: 1/27/2011
 TIME: 1:45 PM
 DRAWN BY: J. GRIFFIN
 CHECKED BY: J. GRIFFIN
 PROJECT: EAGLE VISTA PLAT 2

DATE		REVISIONS		PREPARED		TECH:		ENGINEER:	

3405 S.E. CROSSROADS DRIVE, SUITE G
 GRIMES, IOWA 50111
 PHONE: (515) 369-4400 FAX: (515) 369-4410

CIVIL DESIGN ADVANTAGE

ADEL, IOWA

EAGLE VISTA PLAT 2

CONCEPT

SCALE
0' 50' 100' 200'

N

1" = 2102.100'

CHAPTER 99A

BENEFITED SEWER DISTRICTS

99A.01 Purpose

99A.03 Procedure

99A.02 Intent

99A.04 East Annex Sanitary Sewer Connection Fee
District

99A.01 PURPOSE.

The City has determined the necessity of establishing a policy and a procedure to be utilized to recover the cost of design and construction of major sanitary sewer facilities in those instances in which a significant number of the properties to be benefited by such facilities are not sufficiently developed to permit the recovery of those costs through the special assessment process as provided in Chapter 384, Division IV of the *Code of Iowa*. The City hereby declares its intent to utilize connection fees, as herein provided, to recover the costs for design and construction of such major sanitary sewer facilities from property owners who connect to such facilities subsequent to their construction.

99A.02 INTENT.

It is the intent of this chapter to set forth the method of recovery of proportional cost shares from those property owners who connect their properties to major sanitary sewer facilities subsequent to their construction, so that in the event that all property, other than street and road right-of-way, which lies within the benefited district is connected to the major sanitary sewer facilities during their expected useful life, then those properties shall bear, in the aggregate, up to 100 percent of the cost for design and construction of such facilities, including legal, administrative, and interest expenses associated therewith.

99A.03 PROCEDURE.

1. In the event the Council determines the necessity for construction of a major sanitary sewer facility, and determines that the utilization of a connection fee is the most equitable manner in which to recover the City's costs associated therewith, the Council shall cause a "Notice of Public Hearing on the Proposed Adoption of an Ordinance to Establish a Benefited District and a Connection Fee Schedule" to be published in a newspaper of general circulation within the City as required by Iowa Code Section 384.38(3).

2. At the public hearing, the owners of property within the proposed benefited district shall be heard and may offer comments or objections as to:

- A. The necessity for the project;
- B. The calculation of the area benefited by the proposed major sanitary sewer facilities.
- C. The estimated cost of the proposed facilities; and
- D. The proposed connection fee.

3. Upon concluding the hearing, the Council shall rule upon the objections presented during the hearing and may consider the adoption of the proposed connection fee ordinance. Upon consideration of the proposed connection fee ordinance, the Council may:

- A. Adopt the ordinance as proposed.
- B. Delete elements or portions of the proposed major sanitary sewer facilities from the proposed project and the properties served thereby from the benefited district proposed; or
- C. Amend the ordinance to revise the connection fee.

4. The connection fee ordinance may provide, at the Council's discretion, that single family residences within the benefited district, in existence or under construction upon the effective date of the ordinance, and located within the corporate limits of the City, are eligible for connection to the major sanitary sewer facility. In that event, the ordinance shall include the following provisions:

A. That the owners of residences on parcels of less than one acre in size located within the City may connect such residences to the major sanitary sewer facility upon approval of their application for connection, payment of the connection fee for the parcel, and construction, at the owner's expense, of appropriate connection structures, as determined necessary by the City.

B. That the owners of residences on parcels in excess of one acre in size located within the City may connect such residences to the major sanitary sewer facility upon approval of their application for connection, designation in writing of a one acre single residence parcel and a remainder parcel, payment of the connection fee for the area of the one acre residence parcel, and construction at the owner's expense, of appropriate connection structures, as determined necessary by the City. Any future development of said parcel shall necessitate a revised application for connection and payment of the appropriate connection fee.

All other property located within the corporate limits of the City and within a benefited district shall be eligible for connection to the major sanitary sewer facility upon approval of an application for connection by the owner thereof, as hereafter provided, and payment of the connection fee for such property, provided such property has been appropriately subdivided for development, and, where applicable, all sanitary sewer improvements necessary to serve said property have been constructed, at the owner's expense, and accepted by the City.

5. After adoption, publication and recording by the Clerk of a connection fee ordinance for a benefited district, all owners of those properties within the benefited district whose properties are eligible for connection, and who propose to connect such properties directly

or indirectly to the major sanitary sewer facility, shall make application to the City for such connection. The submittal of construction plans to the City for sanitary sewer improvements on property being subdivided for development shall constitute an application to the City for purposes of this chapter. The sewer connection fee shall be due and payable at the time application is made to the City for connection to the major sanitary sewer facility. No connection shall be made to a major sanitary sewer facility until such application has been approved and until the required connection fee has been paid. The sewer connection fee shall be paid before the City will approve the final plat of property subject to the connection fee.

6. The sewer connection fee shall be in an amount equal to the maximum acre area of contiguous property, or fraction thereof, within the benefited district under common ownership which can be lawfully served through such proposed connection, multiplied by the per acre connection fee or such other fee basis as determined for the benefited district established in the connection fee ordinance for that benefited district. The connection fee ordinance may provide for a graduated connection fee, with annual interest adjustments, such that property owners who connect in later years pay interest on the connection fee for their property. The rate of interest applicable to the connection fee established in each benefited district shall not exceed the rate of interest applicable to special assessments pursuant to Chapter 74A and Section 384.60(3) of the Iowa Code in effect on the date that the connection fee was established for that district by enactment of a connection fee ordinance.

7. The sewer connection fee required by this chapter shall be due and payable to the City and is in addition to, and not in lieu of, any other fees for connection required under the plumbing code or other provisions of this Code of Ordinances.

8. In the event any property owner connects his or her property within a benefited district to a major sanitary sewer facility without having made application therefor or without having received approval thereof or without having paid the required connection fee established by a connection fee ordinance, the City shall be entitled to disconnect such private sewer connection until such time as the property owner has made and received approval of his or her application, and/or has paid the required connection fee.

99A.04 EAST ANNEX SANITARY SEWER CONNECTION FEE DISTRICT.

1. Definitions.

A. "Benefited service area" means a designated area to which sanitary sewer service will be provided by a sanitary sewer utility of a given design and capacity.

B. The boundaries of "The East Annex Sanitary Sewer Connection Fee District" are as follows:

Beginning at the East 1/4 corner of Section 26, Township 79 North, Range 27 West of the 5th Principal Meridian, Dallas County, Iowa.

Thence West along the North line of the South 1/2 of said Section 26, Township 79 North, Range 27 West, to the West 1/4 corner of said Section 26, Township 79 North, Range 27 West. Said point also being the East 1/4 corner of Section 27, Township 79 North, Range 27 West.

Thence West along the North line of the South 1/2 of Said Section 27, Township 79 North, Range 27 West, to the West 1/4 corner of said Section 27, Township 79 North, Range 27 West. Said point is also the East 1/4 corner of Section 28, Township 79 North, Range 27 West.

Thence West along the North line of the South 1/2 of said Section 28, Township 79 North, Range 27 West to the NW corner of the NE 1/4, SW 1/4 of said Section 28, Township 79 North, Range 27 West.

Thence South along the West line of the East 1/2 of the SW 1/4 of said Section 28, Township 79 North, Range 27 West, to the south line of 288th Trail.

Thence Southwesterly along the South line of 288th Trail to a point approximately 359 feet east of the West line of the SW 1/4 of said Section 28, Township 79 North, Range 27 West.

Thence Southeasterly to a point on the South line of the SW 1/4 of said Section 28, Township 79 North, Range 27 West, said point being 778 feet east of the SW corner of said Section 28, Township 79 North, Range 27 West.

Thence Easterly along the South line of the SW 1/4 of said Section 28, Township 79 North, Range 27 West said line also being the North line of the NW 1/4 of Section 33, Township 79 North, Range 27 West to the NW corner of the East 1/2 of the NW 1/4 of Section 33, Township 79 North, Range 27 West.

Thence South along the West line of the East 1/2 of the NW 1/4 of said Section 33, Township 79 North, Range 27 West to the North (Left Downstream) Bank of the North Raccoon River.

Thence easterly and southerly along the Left Downstream Bank of the North Raccoon River to the South line of the NE 1/4 of said Section 33, Township 79 North, Range 27 West.

Thence East along the South line of the NE 1/4 of said Section 33, Township 79 North, Range 27 West, to a point 813.6 ft. West of the East line of the SE 1/4 of said Section 33, Township 79 North, Range 27 West.

Thence South on a line 813.6 ft. West of and parallel with the East line of the SE 1/4 of said Section 33, Township 79 North, Range 27 West to the South line of the SE 1/4 of said Section 33, Township 79 North, Range 27 West.

Thence East along the South line of the SE 1/4 of said Section 33, Township 79 North, Range 27 West to the SE corner of said Section 33, Township 79 North, Range 27 West. Said corner also being the SW corner of Section 34, Township 79 North, Range 27 West.

Thence East along the South line of the SW 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West, to the SE corner of the SW 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence North along the East line of the SW 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West, to the NE corner of the SW 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence East along the North line of the SE 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 East, to the NE corner of the SE 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence South along the East line of the SE 1/4 of the SW 1/4 of said Section 34, Township 79 North, Range 27 West, to the SE corner of the SE 1/4 of the SW 1/4 of said Section 34, 79 North, Range 27 West.

Thence East along the South line of the SW 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West, to the SE corner of the SW 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence North along the West line of the SE 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West, to the NW corner of the SE 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence East along the North line of the SE 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West, to the NE corner of the SE 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West.

Thence South along the East line of the SE 1/4 of the SE 1/4 of said Section 34, Township 79 North, Range 27 West, to the SE corner of said Section 34, Township 79 North, Range 27 West. Said point also being the SW corner of Section 35, Township 79 North, Range 27 West.

Thence East along the South line of Section 35, Township 79 North, Range 27 West to the SE corner of the SW 1/4 of the SE 1/4 of Section 35, Township 79 North, Range 27 West.

Thence North along the East line of the West 1/2 of the East 1/2 of said Section 35, Township 79 North, Range 27 West, to the NE corner of the West 1/2 of the East 1/2 of said Section 35, Township 79 North, Range 27 West.

Thence East along the North line of the East 1/2 of the East 1/2 of said Section 35, Township 79 North, Range 27 West, to the NE corner of said Section 35, Township 79 North, Range 27 West. Said point also being the SE corner of Section 26, Township 79 North, Range 27 West.

Thence North along the East line of the SE 1/4 of Section 26, Township 79 North, Range 27 West, to the East 1/4 corner of said Section 26, Township 79 North, Range 27 West. Said point being the point of beginning.

Connection fees are hereby established and shall be imposed upon owners of properties within the Benefitted District at the time of application to connect their property to said sewer facilities.

C. "Sanitary sewer utility" means and includes sanitary sewer trunk lines and sanitary sewer interceptors, sanitary sewer force mains, pumping stations and detention basins.

D. "Connection" means any act that results in a direct or indirect discharge into a City sewer utility, including but not limited to, the connection of a private sewer system to a lateral sewer or manhole or the connection of a lateral sewer serving a subdivision to a trunk sewer or manhole.

E. "Original cost" means all costs incurred in the design, construction and financing of City sewer utilities necessary to provide sanitary sewer service to the East Annex Sanitary Sewer Connection Fee District, including but not limited to, the cost of labor, materials, engineering, fees, legal fees, closing costs, and interest from the date of construction to payment at the rate equal to 2.75%.

2. Fee Schedule. Connection fees shall be imposed as follows:

A. Connection Fee. A connection fee is established for all existing and future connections for property directly adjoining and abutting the sanitary sewer facilities constructed in the Benefitted District according to the following schedule adjusted annually, which includes increases into which a reasonable amount of interest has been calculated from the date of construction of each particular phase of sanitary sewer facilities to the date of payment:

Effective Date	Connection Fee (\$/acre)*
May , 2020	\$6,083.12
July 1, 2021	\$6,250.40
July 1, 2022	\$6,422.29
July 1, 2023	\$6,598.90
July 1, 2024	\$6,780.37
July 1, 2025	\$6,966.83
July 1, 2026	\$7,158.42
July 1, 2027	\$7,355.28
July 1, 2028	\$7,557.55

July 1, 2029 \$7,765.38

July 1, 2030 \$7,978.92

**

*An interest rate of 2.75% is applied annually to the connection fee.

** The connection fee shall increase in each subsequent year by applying simple interest thereto at the rate of 2.75% percent per annum. The interest rate will not apply to the connection fee before the construction of the particular phase of the sanitary sewer facilities in the Benefitted District to which a property owner may connect has been completed. For example, if a particular phase of the sanitary sewer facilities is not constructed until 2022, then the connection fee in 2022 for property owners who may connect to that particular phase of the sanitary sewer facilities would be \$6,083.12 and the fee schedule for those property owners would run from there.

B. Property Outside City Limits. Pursuant to a 28E Agreement between the City of Adel and Dallas County, dated March 5, 2018, the City Council may authorize the connection of properties outside the corporate limits of Adel to the East Annex Sanitary Sewer. Such properties shall be eligible to connect to the East Annex Sanitary Sewer upon payment of the connection fee and compliance with all other requirements of the City Code. These properties have been included within the boundaries of the East Annex Sanitary Sewer Connection Fee District.

3. Fee Outside District. The established connection fee shall apply to any property outside of the Benefitted District that uses or derives benefit from any of the sewer facilities constructed for the East Annex Sanitary Sewer Connection Fee District. The appropriate fee shall be imposed at the time of determination that a benefit is derived from the property.

4. Exception Within District. The established connection fee shall not apply to the following properties within the benefitted district:

A. Pursuant to the 28E Agreement between the City of Adel and Dallas County, dated March 5, 2018, the property on which the county's public safety facility has been built is exempted from paying the connection fee (Parcel Nos. 1127400013 & 1127400012);

B. Pursuant to the 28E Agreement between the City of Adel and Dallas County, dated March 5, 2018, properties that are currently being served by the county's Ortonville sewer collection system are exempted from paying the connection fee and Dallas County will instead be responsible for the connection fees associated with these properties;

C. The connection fee shall not apply to any properties within the East Annex Sanitary Sewer Connection Fee District which do not use or derive benefit from any sewer facilities constructed for the East Annex Sanitary Sewer Connection Fee District.

5. Payment. The determination that a property is to be connected to the sewer facilities shall occur and the appropriate connection fee shall be paid prior to the time of release of a final plat for recordation or the issuance of a building or plumbing permit, whichever occurs first.

6. Existing Single Family Residence. Any single family residences within the East Annex Sanitary Sewer Connection Fee District, in existence or under construction upon the effective date of the ordinance are eligible for connection to the sanitary sewer utility.

The owners of residences on parcels of less than one acre located within the East Annex Sanitary Sewer Connection Fee District may connect such residences to the sanitary sewer utility upon approval of their application for connection, payment of the connection fee for the parcel, and construction, at the owner's expense, of appropriate connection structures, as determined necessary by the City.

Any single family residence existing or under construction upon the effective date of the ordinance codified in this section located upon a parcel in excess of one acre may apply for connection upon division of said parcel into a single family residence parcel and a remainder parcel in the payment of a single connection fee. Any development of said parcel shall necessitate a revised application for connection and payment of the appropriate connection fee. For purposes of this section, subdivision of the property into a single family residence parcel and a remainder parcel shall only require a reasonably accurate graphical division of the property and shall not be construed to require a legal division of the property.

The owners of residences on parcels in excess of one acre located within the East Annex Sanitary Sewer Connection Fee District may connect such residences to the sanitary sewer utility upon approval of their application for connection, division of said parcel into a residence parcel and a remainder parcel, payment of the connection fee for the residence parcel, and construction, at the owner's expense, of appropriate connection structures, as determined necessary by the City.

The connection fee for the remainder parcel shall be payable at such time as the remainder parcel shall be connected to the sanitary sewer utility. A parcel may be divided once. For purposes of this section, division of the property into a residence parcel and a remainder parcel may be accomplished by submitting a drawing showing a graphical depiction of the two parcels including dimensions accurate to within a distance of one foot, a legal description of the entire parcel and a legal description of the residence parcel with such accuracy as to allow the City to determine a reasonable description of the remainder parcel. For purposes of this section, the division of property does not require a subdivision of the property or a plat of survey.

7. Other Property. All other property located within the East Annex Sanitary Sewer Connection Fee District shall be eligible for connection to the sanitary sewer utility upon approval of an application for connection by the owner thereof, as hereafter provided, and payment of the connection fee for such property, provided such property has been appropriately subdivided for development, and, where applicable, all sanitary sewer improvements necessary to serve said property have been constructed, at the owner's expense, and accepted by the City.

8. Procedure. After adoption, publication and recording by the Clerk of a connection fee ordinance for the East Annex Sanitary Sewer Connection Fee District, all owners of those properties within the Benefitted District whose properties are eligible for connection, and

who propose to connect such properties directly or indirectly to the sanitary sewer utility, shall make application to the City for such connection. The submittal of construction plans to the City for sanitary sewer improvements on property being subdivided for development shall constitute an application to the City. The sewer connection fee shall be due and payable at the time application is made to the City for connection to the sanitary sewer utility. No connection shall be made to a sanitary sewer utility until such application has been approved and until the required connection fee has been paid. The sewer connection fee shall be paid before the City will approve the final plat of property subject to the connection fee.

9. Unauthorized Connections Constitute Municipal Infraction. Any authorized connection(s) to the sanitary sewer utility in the Benefitted District will constitute a municipal infraction pursuant to Section 96.04 of the City Code.

10. Disconnection of Unauthorized Connections. In the event any property owner connects his or her property within the Benefitted District to a sanitary sewer utility without having made application therefor or without having received approval thereof or without having paid the required connection fee established by a connection fee ordinance, the City shall be entitled to disconnect such private sewer connection until such time as the property owner has made and received approval of his or her application, and/or has paid the required connection fee.

(Ch. 99A - Ord. 350 - Aug. 20 Supp.)

Anthony Brown

Subject: RE: Southbridge PUD

From: Bialas, Michael @ Hubbell Realty

Sent: Tuesday, July 26, 2022 5:18 PM

To: Anthony Brown

Cc: Nick Schenck; Kip Overton; Steve Nichols; Ryan Hardisty; Brian Sandberg; Miller, BJ @ Hubbell Realty

Subject: RE: Southbridge PUD

Hi Anthony,

We've had a chance to meet as a team and are asking for the following amendments to the existing PUD:

1. Amending parking requirement to .5 space per dwelling unit. Our current site plan has 30 surface spaces and 4 handicap spaces. 30 spaces allows for 15 parking spaces for staff and another 15 for visitors. This ratio of spaces/units is consistent with our other communities around the metro. **R-4 zoning requires 2 spaces per unit, but City staff agrees.**
2. Change the language in the design standard to be 50% brick/stone on the front elevations and 25% on remaining public facing elevations? We have a few exterior walls (highlighted in green in attached PDF) that face each other and create sort of a narrow courtyard. The design is based on optimizing operations but we've found that there aren't many angles where the public would be able to see the 25% brick/stone. Additionally, with the elevated cost environment we are in now, the opportunity to potentially scale back on a façade of the building that won't materially alter the building aesthetic, helps with the financial viability of the project. **PUD requires 50% on front and 25% on remaining, but City staff agrees.**
3. We'll satisfy the Parkland dedication by installing the 8 foot trail and 5 foot sidewalk as depicted in the diagram attached. We'll have Ryan H. with CDA work with your City engineers to design an acceptable detail. **City staff agrees**

Please let us know your thoughts and if any other information is required to begin drafting the amendment.

Lastly, do you have targeted date in mind for P&Z? It'd be great if we can get to P&Z in August so that we can make the September 13th City Council date.

We're excited to take this project a step forward!

Thanks,

Michael Bialas

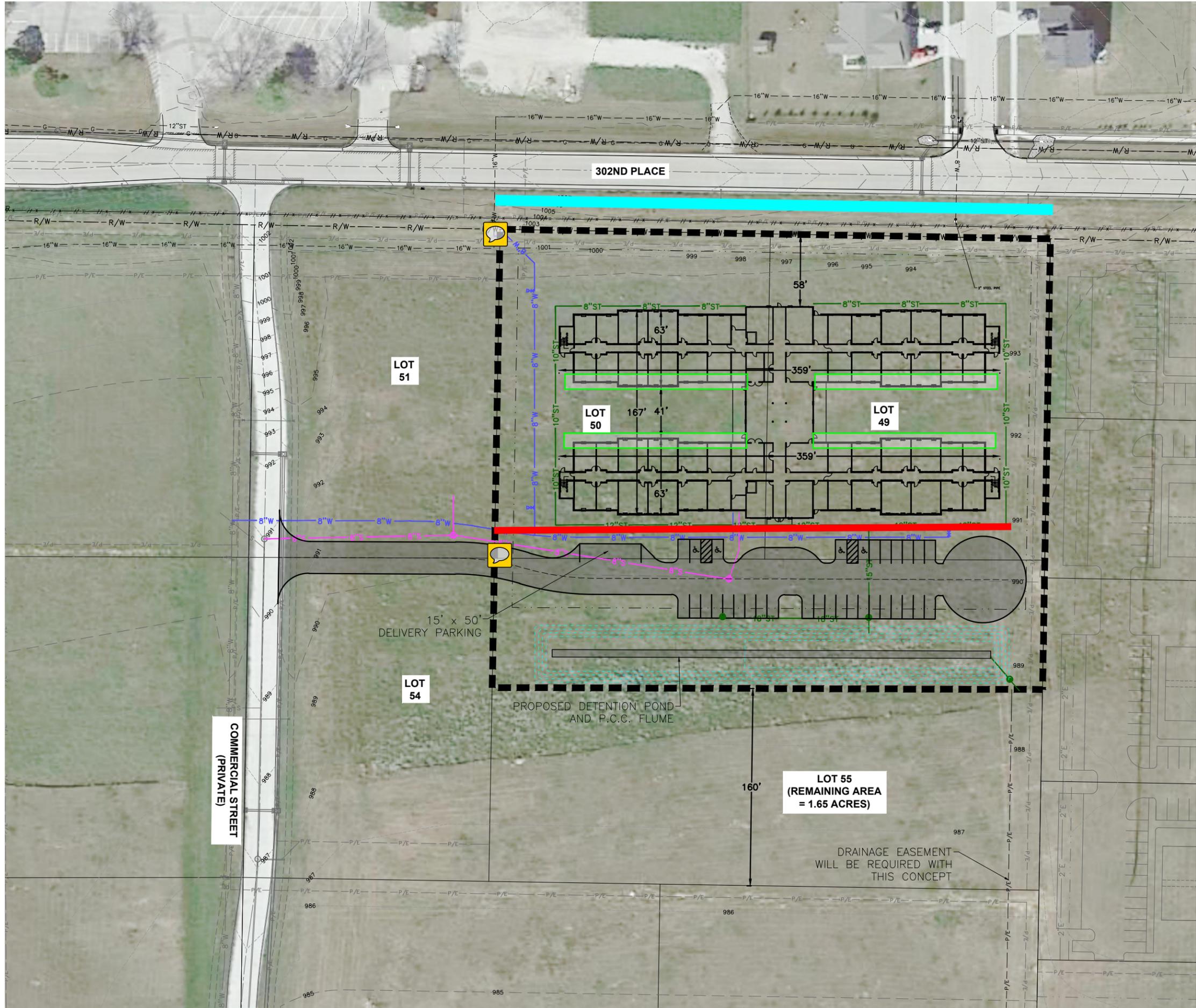
Development Associate

HUBBELL DEVELOPMENT SERVICES

6900 Westown Parkway, West Des Moines, IA 50266



FILE: H:\2021\1079543\1079543-CONCEPTS\1079543-SOUTHBRIDGE-DOUGDETENTION.DWG
 PLOTTED BY: BRANSON HUBBARD
 DATE: 6/23/2022 4:12 PM



PARKING :
 60 UNITS (INDEPENDENT / ASSISTED LIVING)

TOTAL PROVIDED = 32 SPACES

SITE SUMMARY:
 Lot 49: 1.37
 Lot 50: 1.34
 Lot 55: 1.08
 = 3.79 ACRES

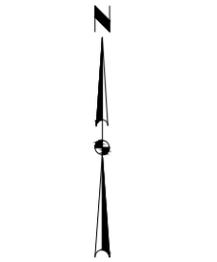
REVISIONS	DATE

3405 S.E. CROSSROADS DRIVE, SUITE G
 GRIMES, IOWA 50111
 PHONE: (515) 369-4400
 ENGINEER: _____
 TECH: _____



ADEL, IOWA

EDENCREST ADEL
SOUTHBRIDGE CONCEPT #2



NOTE:
 BUILDING FOOTPRINT COPIED
 FROM KETTLESTONE EDENCREST.

Tentative Proposal	Idea	Frequency Mentioned	Departments Mentioning Idea	Notes From Staff Submission(s)	Could Idea Be Applied To All?	Audit / Legal Issue?	Operational Impact	Fiscal Impact
*	Increasing Longevity	22	CA, Finance, Library, Parks & Recreation, Police, Public Works	Could implement over 3-5 years; Double longevity; Bonuses at 5, 10, 15, 20 years at \$100 per year); \$0.20 per year	Yes	N/A	Minor administrative burden to set up, some burden to analyze; Specifically tied to retention; Timing impact could be delayed for some; Likely need Union MOU	Would need budget amendment for FY22-23 using reserves; Some savings from departing staff, but not spread across all budgets; Average longevity is approximately 7.5 years and will lower with four new hires, but some will be costly (three at 15, one at 23, and one at 26) every year; Increase for non-exempt staff will increase overtime costs as well
	Increasing Wages --- Council Action 06/14/2022	18	CA, Finance, Parks & Recreation, Police, Public Works	Separate one-time cost-of-living adjustment; Use reserves (i.e., General, LOST, RUT, utilities) to offer increase beyond what is budgeted in FY22-23; Implement entire wage increase for those programmed to receive split increases on July 1; Either temporary inflation match/stipend or additional increases; Be competitive with neighboring towns	Yes	N/A	Some administrative burden to analyze; Could need to adjust current job postings; Could do separate cost of living adjustment with reserves; Likely need Union MOU	Would need budget amendment for FY22-23 using reserves; Could impact future ability to hire new staff in FY23-24 unless valuations are healthy
*	Modified Working Schedule	11	CA, Finance, Public Works	Four 10-hour days?; 9-hour days (need to change overtime too); City Hall M-Th, 7:15-4:45 and F 7:15-11:15	Maybe	Would need to adjust overtime policy	Would better align City Hall staff with Public Works staff to take care of issues; Significant boost to morale for some based on ADM's early-out Fridays; Would need to alter council packet process; Could improve access before normal work times; Could impact some residents on Friday afternoon; Not feasible for Police Department unless more staff; Library somewhat doing this since pandemic	Would need to change the overtime policy for Public Works to reflect anything over the new per-day schedule; Could set up an on-call rate for Public Works for working outside of regular schedule
	Increase Holidays --- Council Action 06/14/2022	9	CA, Finance, Public Works	Additional floating holiday for birthday; Birthday, Good Friday	Yes	N/A	Minor administrative burden to set up; Birthday is easier to justify (i.e., given other religious holidays); Could be a significant boost to morale because we would address the time-off request but not go so far to cause staffing issues	Adding another 8-hour floating holiday would be a reasonable idea compared to some of the more costly options on here
*	Change Regular Part-Time Status	4	Library	Currently 30 hours, but lower to 20 and provide pro-rated time off; many employers offer pro-rated time off to all staff regardless of hours worked	Yes	Needs Review	Minor administrative burden to implement; Definitions need to make sense; Could benefit all departments in the future, but only a few now	Would make sense at 20 hours a week but not lower; Less costly just for time off, more costly if other benefits
*	Retroactive Credit When Transitioning from Part-Time to Full-Time	4	Library	If someone starts as part-time and then is promoted to full-time, set their start date as the part-time date so they get credit for time off accrual and longevity	Yes	N/A	Already doing this for longevity; Minor administrative burden to implement for time off accrual; Makes sense; Could be a significant morale boost for some	Minimal
*	Foster Importance of Every Position Within City	3	Finance	No one should be made to feel that they are just a receptionist	Yes	N/A	Significant boost to morale for some	Costs would be if someone left the City because of this
*	Events for City Employees and Their Families	3	Finance	BBQ, pool party, kickball team, etc.	Yes	Needs Review	Minor administrative burden to implement; More of a Legal / Audit question; Can simply create a "Fun" Committee and pitch in costs instead of City	Costs could be minimal

*	Monthly In-Service Days for City Hall Staff	3	Finance		Maybe	N/A	Minor administrative burden to implement; Currently do 2-3 a year where we close City Hall to the public, but they are spread out and it is hard to maintain momentum; Could use the third Tuesday of the month because we will have to close for an hour for safety training anyway; Could submit plans of work to show results; Improve team building and morale; Could increase productivity and morale; Could impact some residents	Costs could be minimal unless we bring in training / speakers or do lunches
*	Spruce Up Offices	2	CA, Parks & Recreation	New paint, desks, chairs, furniture, tables; need restrooms	Yes	N/A	Some administrative burden to implement; Some work could disrupt operations for a short period; Some work could be major	Some small purchases may already be included in the budget; Larger costs would require waiting for a new budget or using reserves
*	Concern That This Will Be A Waste Of Time	1	Police	If the City didn't care when we were losing people, why should we believe it will care now?	Maybe	N/A	Could lower morale if no ideas are implemented	Could be a cost if someone leaves because we did not act on these ideas or explain our reasons for not doing them
*	Mental Health Services, Resources, and Benefits	1	CA	Check with Cottingham & Butler	Yes	N/A	Some administrative burden to implement; Significant boost to morale for some; Some may not need it now but will later	Unclear what costs would be
*	Leadership / Executive Coaching and Training	1	CA	For department heads with staff; hire a consultant, utilize a college program (DMACC, Drake)	Yes	N/A	More administrative burden to implement; Significant boost to morale for some; If classes held during workday, lose some productivity; If classes held outside of workday, may be harder to get participation; Also for superintendents	Unclear what costs would be
*	Make One Day Meeting-Free	1	CA	Mondays? Fridays?	Yes	N/A	Minor administrative burden to implement, but could impact operations if a time-sensitive item comes in; Significant boost to morale	Minimal if any
=	Free or Lower Cost Insurance	15	Parks & Recreation, Police, Public Works		Yes	N/A	Minor administrative burden to set up; Won't impact everyone	May increase costs because more staff sign up; At the mercy of the health insurance market, so future costs unknown
"=" / Review	Paid Gym Membership or Stipend	14	Finance, Police, Public Works		Yes	Needs Review	Some administrative burden to implement, will need to review insurance if already have; Directly for the health and wellbeing of employees, which should lead to better employees and lower insurance claims; Easier to offer a stipend or negotiate a group rate with one place	Possibly \$40 - \$60 per month per employee (unless we obtain a group / insurance discount), so \$14,400 - \$21,600 per year with 30 employees
=	457b Match	13	CA, Finance, Police, Public Works		Yes	Needs Review	Some administrative burden to implement; Timing impact would be delayed; Not all employees will participate	Would need to have a cap, as the IRS contribution rate is different for different stages (i.e., in 2022, \$20,500 regular limit, \$27,000 age 50+ limit, and \$41,000 3-year catch up before normal retirement limit); However, even 1% of regular limit is only \$205, which would be \$6,150 max. if all 30 employees reached that limit; Budgeting a simple dollar match (e.g., \$10 per paycheck) would be easier to budget
=	Carry Over More Hours Or Pay Out	9	CA, Police, Public Works	Vacation, comp. time, sick time; increase comp. time bank to 80 hours plus	Yes	Needs Review	Significant, as some departments can barely cover time-off requests now; Some staff already forfeit unused vacation hours; Fairness question	If we provided more comp. time, it could lower overtime costs; Some departments would ask for additional staff to cover the extra time being taken off
=	Increase License / Certification Pay	7	Public Works	\$1.00 per hour	Maybe	N/A	Policy would need to be carefully crafted to determine what qualifies; Unclear if this provision is being utilized now	While the cost impact could be relatively minor, there is a fairness question because some positions do not have certifications; Why not put money into wages for all?

=	Bonus and/or Hiring Bonus	5	CA, Finance, Police	One-time bonuses using state / federal COVID funds; One-time "COVID" bonus to current employees as gesture of good faith	Yes	Needs Review	Some administrative burden to implement; Some analysis needed on use of these funds; Fairness question unless no hiring bonus	Cost impact for one-time bonus easy to project; Concern that this idea instead of a permanent increase to wages will be less meaningful; However, a larger amount would be an immediate cash boost and maybe give the City more time to make progress on other items
=	Fuel Stipend	2	CA, Police	For everyone; just for out-of-city workers	Yes	N/A	Fairness question; More administrative burden to implement; Policy would need to be carefully crafted to determine criteria	Costs would depend on where people live
≠	Lower Years Required for Increased Vacation	8	Parks & Recreation, Public Works	Accrue hours at a sooner rate in employment; 0-3 years at 80 hours, 4-7 years at 120 hours, 8-16 years at 160 hours, 17-24 years at 200 hours, over 25 years 240 hours	Yes	N/A	Minor administrative burden to implement; Concern about staffing issues; Some staff already forfeit unused vacation; We already accelerated this in 2020; We would want to analyze how many hours are being carried over to determine whether staff are just not using their time	Could be some cost to productivity or overtime if others are covering for people away; Some departments would ask for additional staff to cover the extra time being taken off
≠	Switch to PTO Instead of Sick / Vacation Time	4	Library	PTO without distinction; could encourage staff to use PTO more effectively, achieve work-life balance, and reduce burnout	Yes	Needs Review	More administrative burden to implement; Timing impact would be delayed; More research; Concern that this could take away a benefit; What would we do with current Sick Leave balances, as a PTO policy would require drastic reductions?; Unclear how much support for this in other departments; Could be more flexible with sick/family leave instead	Cost impacts are unclear when considering our vacation payout policy and the idea to payout sick time upon retirement
≠	Yearly Stipend for Living Within City Limits	3	Police		Yes	Needs Review	Some administrative burden to implement; Fairness question; Some positions already are required to live inside City limits, but most are not; finding an affordable house within City limits may be challenging	Unclear what costs would be
≠	Education Incentives	3	Police	Additional pay for levels of education; meaningful tuition reimbursement; college tuition reimbursement	Yes	Needs Review	Fairness question; Morale could be impacted; We already have tuition reimbursement program; Would this encourage staff to return to school to get this incentive?; We have many positions where we only require a high school diploma and those staff are doing a great job already; Policy would need to be carefully crafted to determine what qualifies	Some costs here, but would depend on the rates
≠	Free employee cemetery space(s)	2	CA, Public Works	For employee, spouse, and children if applicable	Yes	Needs Review	Fairness question; Timing impact would be delayed; some administrative burden to implement; Legal / Audit questions; Could be seen as too creepy!	Costs could be minimal unless you factor in losing the fees of someone else who would have paid for it; Costs would grow if you factored in multiple family members
≠	Implement Reserve Officer	1	Police		No	Needs Review	More administrative burden; Policy would need to be carefully crafted; Question of control	Could require a stipend; Training and testing costs
≠	Assist with Raccoon Valley Golf Course Membership	1	Police	Corporate membership like other businesses	Yes	Needs Review	Fairness question; Some administrative burden to implement; Unclear on how to justify	Unclear what costs would be
≠	Donate to Charity of Employee's Choice	1	CA		Yes	Needs Review	There is a State Auditor opinion on using public dollars for contributions and requiring a written agreement, so this is not feasible; More administrative burden to implement; Policy would need to be carefully developed	Unclear what costs would be
Future	Sick Leave Changes At Retirement	16	CA, Finance, Police, Public Works	Some form; Pay out 50% at retirement with a minimum of 10 years like County; unused sick time to supplement insurance at retirement; pay out all	Yes	Needs Review	More administrative burden to analyze and implement; Timing impact would be delayed; Questions about using employee benefits levy, COBRA policies, and Medicare rules	Difficult to project costs and timing of retirements

Future	Additional Full-Time Staff	10	Library, Parks & Recreation, Police	Open 10-12 hours less per week than other cities and splitting duties; Develop "Building Specialist" for indoor work and some outdoor work, splitting budget based on each building's needs; Not meeting national averages for officers / population	Yes	N/A	More administrative burden to implement; Timing impact would be delayed; Likely every department could benefit from this	With limited funds, the City would likely have to choose between this item and funding some of the other items; Would involve more than just wages (e.g., equipment, vehicles, benefits)
Future	City Insurance After Retirement	7	Public Works	Pay out of pocket but remain on City insurance after retirement	Yes	Needs Review	Some administrative burden to implement; How does Medicare factor into this?	We already offer COBRA for 18 months that does exactly this
Future	Additional Part-Time Staff	6	Library, Parks & Recreation, Police	Relying on volunteers and small part-time numbers but cannot meet needs; For spring and fall grounds maintenance; Potential future full-time officers	Yes	N/A	More administrative burden to implement; Timing impact would be delayed; Already having trouble hiring full-time staff; Not as flexible compared to full-time staff	Cost impact would be reduced if insurance is not offered; Possible that a part-time position would be expected to transition into a full-time position, so projecting that timing and cost would be important
Future	Enhanced Paternity / Maternity Leave	5	Library, Police	Comprehensive parental leave regardless of gender; another idea was one week paid for fathers and 6-8 weeks paid for mothers	Yes	Needs Review	Some administrative burden to implement; Concern about staffing issues; Fairness question	Assuming this would be a new bank of leave that would be fully paid and separate from other leave banks; Would incentivize taking 12 weeks and could require temporary staff; Would make offering short-term disability not needed for this use
Future	Increase Budgets for Continuing Education	5	CA, Library	Send staff to professional development, conferences, and trainings both in and out of state; Only \$800 when other cities budget up to \$7,000; staff needs to get up to 45 hours every three years and finding cheap or free options is difficult	Yes	N/A	Some administrative burden to implement; Timing impact would be delayed; Depends on each department	Costs would be very department-specific; We could make this a priority in the next budget cycle
Future	Rewards for Not Using Sick Time	2	Finance, Police	Once you reach a certain number of sick days, allow employee to cash in sick days for vacation days (e.g., 3 sick days for 1 vacation day twice annually); Possibly an additional day off, especially when maxed out on sick time	Yes	Needs Review	Some administrative burden; Could discourage taking sick days unless we require a bank to be met before use; Concern about staffing issues; Would help because we don't want people to abuse sick leave	Could reduce the liability of cashing out if we also implement that idea
Future	Implement Step Increase System in 2025	1	Police		Maybe	Needs Review	More administrative burden; Could motivate staff to stay longer to reach certain step goal; Has not been supported in the past because of costs	Difficult to project costs and could limit adding additional staff
Future	Social Media Presence	1	Police	Help with recruiting, sharing and gathering information, public relations, etc.	Yes	N/A	While setup would be a minor administrative burden, maintaining it could be a significant administrative burden; Policy would need to be carefully crafted; Concern not enough staff to operate it	Staff time and delaying other projects
Future	Creating Special Assignments	1	Police	K9, SERT, etc.	Maybe	Needs Review	More administrative burden; Concern not enough staff now	If new officers, additional costs
Future	Hire Water Operator to Assist Pool	1	CA	Partially paid by LOST; dedicated to pool in summer	No	N/A	More administrative burden to implement; Job description and authority would need to be carefully constructed; Similar to Building Maintenance idea	Could be \$50,000 in wages, then benefits; Would need to determine appropriate split with LOST and Water
Future	Contract Maintenance of Cemeteries	1	Parks & Recreation		No	N/A	Some administrative burden to implement; Quality could improve or degrade depending on contractor and amount of time spent	Unknown cost, but likely higher than current practice
Review	Vision Insurance	12	Police, Public Works		Yes	N/A	Some administrative burden to implement	Could be relatively affordable, as Cottingham & Butler could help us get a cheaper employee plan; Need to determine if HRA amount is tied to medical deductible
Review	Offer Paid Days Off for Service / Volunteer Opportunities	7	Finance, Library	Two paid volunteer days annually with a signed form; Instead of using paid time off	Yes	Needs Review	Policy would need to be carefully crafted to determine what qualifies; Could not limit it to Adel organizations; Would we want them to wear an Adel logo?; Could be a significant boost to morale for some staff	Could be minor cost to productivity or overtime if others are covering for people away
Review	Free City Amenities	7	Finance, Parks & Recreation, Police	Pool passes, recreation leagues, archery license, pet licenses, golf cart permits, wash bay, etc.	Yes	Needs Review	Minor administrative burden to implement; Wash bay has been nixed by Audit and Insurance; Fairness question; Residents / Audit concerned?	Minor cost impact if any; Would we need to report this on their W-2 as wages?

Review	Providing Equipment	5	Finance, Police	Making sure staff is equipped with what they need to be most productive (e.g., software, furniture, etc.); Firearms, outer vest carrier, ballistic vests; could be optional if someone wants to use their own	Maybe	Taxed?	Policy would need to be carefully crafted to determine what qualifies; We already provide the Fire Department will all their gear; We would have more control over the type of equipment if we bought it	Possibly a one-time or infrequent expense using a replacement rotation schedule
Review	Touch-Base Performance Development Meetings Instead of Annual Review	1	CA	No more annual review; 15 minutes once a week or every other week; focus on performance development rather than performance measurement because we do not provide performance raises	Yes	Needs Review	Some administrative burden to implement; Policy on goals and corrective actions would need to be considered; Mainly a time factor	Minimal if any
Review	Paid Quarterly Team Meal	1	Parks & Recreation		Yes	Needs Review	Minor administrative burden to implement; Likely Audit / Legal question (i.e., would need to meet public purpose standards)	Cost would vary by department and whether food is made on-site or at a restaurant
Review/ Future	Develop "deputy / assistant" positions	1	CA	For City Administrator and other department-heads; Library has this already; Police has this in role and pay but not name	Maybe	N/A	More administrative burden to implement; Would need to carefully develop job descriptions and duties	Would need to determine if we pay at 85% of head position (i.e., like the Police Department) or whether we use a different guideline

City of Adel
Manual of Policy and Procedure

Section: 3. City Hall and City Operations

Title: Flowers and Sustenance Supplies Policy

**DRAFT
PROPOSAL**

Effective Date: May 2001
(Revisions) November 12, 2013 – Council Approval
March 8, 2016 – Council Approval

Resolution No. 01-04
N/A

Policy Number: 3.05.01

1. PURPOSE

The City Council of the City of Adel believes that it is in the best interest of the residents of the City to establish a public purpose policy for the expenditure of funds for flowers and sustenance supplies.

2. DEFINITIONS

- A. **Immediate family** shall be defined as an employee's brother, sister, mother, father, legal guardian as a child, children, parent-in-law, or child-in-law.
- B. **Sustenance** is defined as something that gives support, endurance, or strength in times of illness or in times of grief due to a death.

3. POLICY

- A. The City may send flowers to the employees or family members of employees and/or elected or appointed officials who are suffering an illness or who experience a death in their immediate family as defined above.
- B. The maximum City expenditure for these gifts should not exceed ~~\$75.00~~100.00.
- C. The Department Heads shall be responsible for the purchase of these gifts for employees under their own supervision.
- D. The City Administrator may approve expenditures for flowers and/or gifts to other persons as appropriate.
- E. The City may purchase sustenance supplies for the City's use. Sustenance supplies will include, but not be limited to, the following:
 - 1) Coffee, paper products, and/or utensils.
 - 2) Any products deemed necessary by the Department Head and falling under the term sustenance.

City of Adel
Manual of Policy and Procedure

Section: 2. Human Resources

Title: Travel Policy

Effective Date: November 12, 2013 – Council Approval **Resolution No.** N/A
(Revisions)

Policy Number: 2.04.01

1. PURPOSE

It is the expressed purpose of this policy to provide the employee with reasonable travel accommodations and City business related expense reimbursement, while maintaining prudent spending practices. The City of Adel encourages employees to participate in job related training for enhanced professional development and for maintaining requisite certifications. On occasion, employees may be required to attend business related functions which serve the best interest of the City. Expenses incurred during the course of out-of-office business and business related travel will be reimbursed by the City based upon documented, reasonable, and necessary expenses with the prior approval from the City Administrator or Chief of Police.

2. POLICY

- A. Budget appropriations for travel and training should be reviewed by the department head prior to requesting travel approval. Travel requests that exceed budget balances will not be automatically approved and will require substantial justification to merit approval.
- B. All training, conference, travel, and business related expenses must be pre-approved by the City Administrator, Chief of Police, or City Council. A **Travel Request – Reimbursement Form** must be completed and contain signed approval prior to incurring the expense for the reimbursement.
- C. Once an employee submits a request, the employee will receive a response. If it is approved, the employee must retain the copy of the approval and resubmit a copy with the post event expenses documented and appropriate substantiation within ten days of completing the event in order to be reimbursed. Any request for travel advance monies must be indicated on the form and submitted no less than five days prior to the event. Expenses submitted for reimbursement must be accompanied by

the **actual receipt** for the expense. Without a proper receipt, the reimbursement will not be approved. Advances made to the employee must be supported by attaching actual receipts to the copy of the **Travel Request – Reimbursement Form** following the training.

D. Employees are expected to seek the most reasonable prices available for lodging, meals, and fares, considering location and services. **In accord with IRS Regulations, the City will reimburse employees for meals only when overnight travel is required or when the cumulative travel time and instruction is twelve hours or greater.** There will be no meal reimbursement for sponsored activities providing the meal free of charge to the attendees. Rates listed below include gratuity where applicable:

1) Breakfast: \$8.00

2) Lunch: \$12.00

3) Dinner: \$20.00

City staff proposes to use the federal government's <https://www.gsa.gov/travel/plan-book/per-diem-rates> so that costs are based on location. It would still be based on a per meal basis. Legitimate meals covered by an event or conference would not apply because the City already is paying for that in the registration cost.

E. Costs incurred above the applicable expense ceilings will not be paid and are the responsibility of the employee, unless prior approval from the City Administrator or Chief of Police is obtained.

F. When traveling in a group, each employee is responsible for paying and accounting for his or her own meals and incidental expenses. However, payment and accounting of registration fees, transportation, and lodging can be consolidated and either advanced or reimbursed to one person in the group.

3. **ADVANCES**

A. An advance of funds for actual or estimated travel expenses will be made upon application for such on the **Travel Request – Reimbursement Form**, and will only be approved by the City Administrator or Chief of Police based on proper documentation and need.

B. Travel expenses eligible for advanced funding include:

1) Registration

2) Lodging

3) Mileage

4) Public transportation (air, rental car, cab, rail, or bus)

5) Meals (within the daily expense ceiling)

- C. Incidental expenses are considered reimbursable and will not be advanced.
- D. No funds advanced may be used for any purpose other than those applied for on the form, even if the employee intends to subsequently reimburse the City those funds. For example, employees may not use the advance for entertainment or similar personal expense even if they intend to repay the City.
- E. Except for registration fees, advances for expenses less than \$30 will not be made.

4. MISCELLANEOUS NON-REIMBURSABLE EXPENSES

Ineligible expenses include, but are not limited to, the following:

- A. Non-business related entertainment
- B. Alcoholic beverages
- C. Late check-out fees
- D. Gifts
- E. Personal calls
- F. Laundry or dry cleaning
- G. Towing

H. Parking

City staff proposes removing Parking from the non-reimbursable expense list.

- I. Traffic fines
- J. Room upgrades
- K. Room service
- L. Pay-per-view movies
- M. Tobacco
- N. Personal products

- O. Change of flight fees
- P. Any expense for spouse, dependents, or guests
- Q. Transportation costs or mileage for travel unrelated to city business
- R. Any incidental expense not pre-approved

5. TRAVEL TIME

- A. In the event employees are required to report to their work facility prior to travelling for work related training or conferences, they will receive pay for time spent travelling from the workplace and when returning if leaving immediately following the event. Time spent at the workplace on work related duties is considered regular work time.
- B. When travelling by personal vehicle or a City vehicle and departing from home, employees will be paid travel time, beginning at their time of departure, at their regular hourly rate for travel in excess of 30 miles. Travel directly from home to a location less than 30 miles will not receive travel pay for the time in the commute, unless the employee holds a safety sensitive position that upon observance of an event may require a response that would divert him or her from the intended training event (e.g., full-time police officer or fire fighter commuting in a squad car).

6. IN-STATE TRAVEL

Unless another mode of transportation is specifically approved by the City Administrator, all in-state travel will be by either City vehicle or private automobile. In the case of the latter, mileage at the current allowable IRS rate will be paid. For police department travel, City vehicles shall be used except for academy training which the officer candidate shall use his or her own vehicle and be reimbursed per policy.

7. OUT-OF-STATE TRAVEL

Unless time is a critical factor, all out-of-state travel within five hours driving time will be by car. Air travel will be approved, in lieu of the car, in those instances where it is deemed absolutely necessary.

8. TRANSPORTATION

Arrangements for travel by airline are to be made with the assistance of the City Administrator to secure the lowest possible fares and reduce complications. All air travel

will be by coach class. Travel by rail or bus may be arranged by the department head, with the assistance of the City Administrator if desired. Requests for airline tickets should be made well in advance of the travel date, but under no circumstances less than three (3) working days from that date.

9. **LODGING**

Arrangements for lodging should be made through the accounting clerk or City Clerk. When it is not possible to make lodging arrangements through the accounting clerk or City Clerk, the employee may secure the room on his or her credit card. Regardless of an advance or a reimbursement, the employee must submit a hotel/motel bill upon completion of the trip. A credit card receipt alone is not sufficient documentation.

10. **ROUTINE TRAVEL**

Routine travel for regular in-state meetings of professional organizations, in which the employee holds membership or sponsored by an organization the employee is a member of, does not require the completion of a **Travel Request – Reimbursement Form**, provided lodging is not required. Similarly, travel to State sponsored training or conferences follows the same exception. Under both exceptions outlined above, if mileage reimbursement from use of a personal vehicle, reimbursable meals, or travel time is requested, then a **Travel Request – Reimbursement Form** must be submitted. The Chief of Police shall oversee this travel policy for the police department.