

NOTICE OF SPECIAL VILLAGE BOARD MEETING

**Monday, February 14, 2022 at 6:00 p.m.
Caledonia Village Hall – 5043 Chester Lane**

- 1. Meeting called to order**
- 2. Roll Call/Introductions**
- 3. Public Hearing Items**
 - A. Proposed Special Assessments for a Sanitary Sewer and Watermain Construction Project Along 4 Mile Road in the Village of Caledonia, Wisconsin
- 4. Non-Public Hearing Items**
 - A. **Resolution 2021-56** – Proposed Special Assessments for a Sanitary Sewer and Watermain Construction Project Along 4 Mile Road in the Village of Caledonia, Wisconsin
 - B. Information Technology Services Discussion
- 5. Adjournment**

Dated February 11, 2022

Joslyn Hoeffert
Village Clerk

RESOLUTION NO. 2021-56

FINAL RESOLUTION
EXERCISING ASSESSMENT POWER REGARDING THE
FOUR MILE ROAD SANITARY SEWER AND WATERMAIN PROJECT
Village of Caledonia, Racine County, Wisconsin

WHEREAS, the Village Board of the Village of Caledonia, Racine County, Wisconsin has constructed a sanitary sewer main and watermain project along Four Mile Road (the “Project”), to be owned and operated by the Village of Caledonia Utility District, to serve the area described in the Report mentioned below and which is on file with the Village Clerk, all within the Village of Caledonia, Racine County, Wisconsin; and

WHEREAS, the Village Board of the Village of Caledonia intends to pay for a part of the costs of the Project by levying special assessments, in an exercise of its police power, pursuant to the terms and provisions of Section 66.0703 of the Wisconsin Statutes, and the Village Board expressly declared this intent in a Preliminary Resolution adopted on March 18, 2019, all as required by such Statute; and

WHEREAS, as further required by Section 66.0703 of the Wisconsin Statutes, a Report has been prepared and duly filed with the Village Clerk regarding such project and proposed special assessments, and a public hearing held on the matter, at which hearing persons appeared and voiced their questions and objections to the same;

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The Report on file with the Village Clerk regarding the said Project is hereby amended to be in the conformity with the revised Report, dated September 28, 2021, which is attached hereto as Exhibit A, and, as so modified, such Report is hereby adopted and finally approved; and

2. The cost of the Project shall be paid, at least in part, by the levying of special assessments, in an exercise of the police power of the Village, pursuant to Section 66.0703 of the Wisconsin Statutes, and that such special assessments be levied in the amounts and in the manner specified in the said Report (Exhibit A) referred to above, such special assessments being determined on a reasonable basis and all of the assessed properties being benefitted by the said project; and

3. The Village Clerk is hereby directed to publish this Final Resolution as a Class 1 Notice in the Racine Journal Times newspaper, being a newspaper of general circulation in the said Village, and the Village Clerk is further hereby directed to mail a copy of this Final Resolution to all interested persons whose post-office address is known, or can be ascertained with reasonable diligence. Additionally, to the extent provided for by law, the Village Clerk shall (i) prepare the Installment Assessment Notice regarding the said special assessments, and (ii) publish the

Installment Assessment Notice as a Class I Notice, and (iii) mail the said Notice to all of the benefitted Property Owners, all as required by law.

ADOPTED this ____ day of February, 2022, by the Village Board of the Village of Caledonia, Racine County, Wisconsin.

VILLAGE OF CALEDONIA

By: _____
James R. Dobbs
Village President

Attest: _____
Joslyn Hoeffert
Village Clerk

AMENDED
SPECIAL ASSESSMENT REPORT
FOR THE TID 4
DEBACK PHASE III WATERMAIN & SEWER EXTENSION PROJECTS,
IN THE CALEDONIA WATER & SEWER UTILITY DISTRICTS,
VILLAGE OF CALEDONIA, RACINE COUNTY, WISCONSIN
SEPTEMBER 28, 2021

SPECIAL NOTE:

This Amended Report has been prepared using the original estimated project costs and the related original proposed special assessments. The actual project costs, however, are higher than those estimated costs.

If the actual project costs were used for this Amended Report, it would result in higher proposed special assessments. The use of the higher actual project costs to calculate proposed special assessments is not being recommended to the Village Board by the Caledonia staff. For that reason, the original estimates and the original proposed special assessments, continue to be used in this Amended Report.

Pursuant to the provisions of Section 66.0703 of this Wisconsin Statutes, and pursuant to the Preliminary Resolution adopted by the Village of Caledonia Village Board on the date of March 18, 2019, the undersigned hereby files with the Village Clerk of the Village of Caledonia, located in Racine County, Wisconsin, this report regarding the TID 4 DeBack Phase III Water Main and Sewer Extension Projects and its related Special Assessments.

All of the real properties described herein are “benefitted properties” under the applicable Wisconsin Statutes, and are accordingly being specially assessed for a part of the project cost as an exercise of the police power of the Village of Caledonia, Wisconsin, and the Caledonia Water & Sewer Utility Districts, as allowed in Section 66.0703 of the Wisconsin Statutes.

Dated: September 28, 2021



Thomas J. Ludwig, P.E.
State Operations Director
Foth Infrastructure & Environment, LLC
(Engineers for the Caledonia Sewer and Water Utility Districts)

AMENDED
SPECIAL ASSESSMENT REPORT
FOR THE TID 4
DEBACK PHASE III WATERMAIN & SEWER EXTENSION PROJECTS,
IN THE CALEDONIA WATER & SEWER UTILITY DISTRICTS,
VILLAGE OF CALEDONIA, RACINE COUNTY, WISCONSIN
SEPTEMBER 28, 2021

GENERAL DESCRIPTION OF THE PROJECT

Water and Sewer Mains, and related infrastructure, were installed along 4 Mile Road in the Village of Caledonia, Wisconsin. The 4 Mile Road Segment is generally from the East Frontage Road to approximately 3,600 LF east. This project was undertaken by the Caledonia Water & Sewer Utility Districts.

The residential and commercial properties, both within and adjacent to the TID 4 DeBack Phase III properties, benefited by this project and the utilities are described in Exhibits 1 through 9.

ATTACHMENTS

This report includes the following attachments:

SCHEDULE A: PLANS AND SPECIFICATIONS FOR WATER MAIN

SCHEDULE B: CONSTRUCTION COST & ASSESSABLE WATER MAIN ESTIMATE

SCHEDULE C: CONSTRUCTION COST & ASSESSABLE WATER SERVICE ESTIMATE

SCHEDULE D: CALCULATION OF THE WATER MAIN ASSESSMENT RATES

SUMMARY NOTES FOR WATER MAIN

EXHIBIT 1: A PORTION OF THE VILLAGE OF CALEDONIA CODE OF ORDINANCES,
SECTIONS 9-1-56 TO 9-1-57

EXHIBIT 2: DEBACK PHASE III WATER MAIN ASSESSMENT SCHEDULE

EXHIBIT 3: BENEFITED PROPERTIES – DEBACK PHASE III WATER

EXHIBIT 4: ASSESSABLE IMPROVEMENTS – DEBACK PHASE III WATER

SCHEDULE E: PLANS AND SPECIFICATIONS FOR SEWER MAIN

SCHEDULE F: CONSTRUCTION COST & ASSESSABLE SEWER MAIN ESTIMATE

SCHEDULE G: CONSTRUCTION COST & ASSESSABLE SEWER LATERAL ESTIMATE

SCHEDULE H: CALCULATION OF THE SEWER MAIN ASSESSMENT RATES

SUMMARY NOTES FOR SEWER MAIN

EXHIBIT 5: DEBACK PHASE III SEWER MAIN ASSESSMENT SCHEDULE

EXHIBIT 6: BENEFITED PROPERTIES – DEBACK PHASE III SEWER

EXHIBIT 7: ASSESSABLE IMPROVEMENTS – DEBACK PHASE III SEWER

CONTENT FOR AN INSTALLMENT ASSESSMENT NOTICE

EXHIBIT 8: DEBACK PHASE III ASSESSMENT SCHEDULE

EXHIBIT 9: A PORTION OF THE VILLAGE OF CALEDONIA CODE OF ORDINANCES,
SECTION 9-4-5

SCHEDULE A

PLANS AND SPECIFICATIONS FOR WATER MAIN

There is on file in the office of the Village Clerk, a set of plans and specifications for the construction project, which are available for review during business hours. Said plans and specifications are hereby incorporated into this report by reference. The route of the water main for the municipal project is shown on Exhibit 4.

SCHEDULE B
DeBack Phase III Extension Special Assessments
Construction Cost & Assessable Water Main Estimate
Village of Caledonia

May 7, 2019

Description	Estimated Quantity	Unit	Estimated Unit Price	Total Amount
Water Main				
Mobilization/Demobilization	1	LS	\$52,500.00	\$52,500
Clear and Grub	1	LS	\$1.00	\$1
Stripping and Stockpiling Topsoil	1	LS	\$15,000.00	\$15,000
Remove and Replace Signing	1	LS	\$750.00	\$750
Remove and Replace Postal Boxes	1	LS	\$900.00	\$900
Silt Fence	2,055	LF	\$2.00	\$4,110
Tree Removal	28	ID	\$25.00	\$701
Inlet Protection	2	EA	\$100.00	\$150
Rock Filled Filter Bag	15	EA	\$13.00	\$195
Traffic Control	1	LS	\$7,500.00	\$7,500
Sawcut Pavement, Full Depth	510	LF	\$2.00	\$1,020
Topsoil, Seed, Fertilizer, and Erosion Mat	8,100	SY	\$5.00	\$40,500
12-inch PVC Water Main (spoil)	47	LF	\$170.00	\$7,956
16-inch PVC Water Main (mandatory trenchless)	848	LF	\$210.00	\$178,080
16-inch PVC Water Main (spoil)	3,121	LF	\$160.00	\$499,360
16-inch PVC Water Main (granular)	231	LF	\$210.00	\$48,510
16-inch PVC Water Main (slurry)	66	LF	\$300.00	\$19,800
16-inch PVC Water Main (borrow)	590	LF	\$190.00	\$112,100
12-inch Butterfly Valve	4	EA	\$3,000.00	\$12,000
16-inch Butterfly Valve	9	EA	\$4,000.00	\$36,000
Hydrant Assembly	10	EA	\$7,000.00	\$70,000
6-inch Hydrant Lead	152	LF	\$125.00	\$19,000
Flushing and Sampling of Water Main installed by Others	2	EA	\$5,000.00	\$10,000
Connect to Existing Water Main	2	EA	\$8,900.00	\$17,800
Estimated DeBack Phase III Water Main Cost				\$1,153,933
Estimated Design Engineering				\$92,315
Estimated Construction Administration Cost				\$92,315
DEBACK PHASE III WATERMAIN TOTAL				\$1,338,563
Residential Water Main Assessment (\$9,431.59 * 14)				\$132,042
Nonresidential Water Main Assessment Amount (\$14,147.39 * 3)				\$42,442
Total Watermain Assessment				\$174,484

1. Costs based on low bid received 10-09-18 for the DeBack Industrial Park Phase III Utility Improvements Project.
2. The base water main assessment amount of \$9,431.59 is based on the past 8" water main assessment of \$8,807.74 adjusted for future costs.
3. Water main assessment amount for non residential properties is based on a 12" equivalent water main and results in an assessment amount of \$14,147.39, as hereafter described in this report.
4. No lateral costs are included in the above estimate. These costs will be assessed, however, in addition to the costs outlined on the above assessment schedule.
5. Assessable amounts based on previous assessed projects. The final assessments will be administratively reduced, per the Wisconsin statutes, if the final costs are less than the estimated cost used in this Report.

SCHEDULE C
DeBack Phase III Extension Special Assessments
Construction Cost & Assessable Water Service Estimate
Village of Caledonia

May 7, 2019

Description	Estimated Quantity	Unit	Estimated Unit Price	Total Amount	Assessment	Oversizing Portion
Water Service - Residential						
1 1/4" HDPE Water Service - Open Cut	274	LF	\$120	\$32,880	\$27,816.48	\$5,064
1 1/4" HDPE Water Service - Mandatory Trenchless	101	LF	\$120	\$12,120	\$10,265.64	\$1,854
1 1/4" Water Services Fittings	15	EA	\$900	\$13,500	\$11,427.75	\$2,072
Estimated DeBack Phase III Residential Water Service SubTotal				\$58,500	\$49,510	\$8,990
Estimated Design Engineering				\$4,680	\$468	\$4,212
Estimated Construction Administration Cost				\$4,680	\$468	\$4,212
DeBACK PHASE 3 RESIDENTIAL WATER SERVICE TOTAL				\$67,860	\$50,446	\$17,414
Water Service - Commercial						
12" PVC Water Service - Spoil Backfill	153	LF	\$170	\$26,010	\$15,190.00	\$10,820.00
12" PVC Water Service - Borrow Backfill	43	LF	\$200	\$8,600	\$5,027.00	\$3,573.00
12" PVC Water Service - Slurry Backfill	29	LF	\$340	\$9,860	\$5,768.00	\$4,092.00
Estimated DeBack Phase III Commercial Water Service SubTotal				\$44,470	\$25,985	\$18,485
Estimated Design Engineering				\$3,558	\$356	\$3,202.00
Estimated Construction Administration Cost				\$3,558	\$356	\$3,202.00
DeBACK PHASE 3 COMMERCIAL WATER SERVICE TOTAL				\$51,585	\$26,695	\$24,890

1. Costs based on low bid received 10-09-18 for the DeBack Industrial Park Phase III Utility Improvements Project.

SCHEDULE D

CALCULATION OF THE WATER MAIN ASSESSMENT RATES

TOTAL WATER MAIN PROJECT CONSTRUCTION COST \$1,153,933

I. COST SHARING SUMMARY

TOTAL PROJECT CONSTRUCTION COST	\$1,153,933
DESIGN & CONSTRUCTION ENGINEERING	\$184,629
REGIONAL OVERSIZING COST	(\$493,838)
REGIONAL LOOPING COST	(\$323,178)
NON ASSESSABLE WATER MAIN	(\$237,458)
NET ASSESSABLE WATER MAIN COSTS	<u>\$284,088</u>

II. WATER MAIN ASSESSMENT RATE

TOTAL ASSESSABLE WATER MAIN COST	\$284,087.84
BASE NON-COMMERCIAL ASSESSABLE WATER COST \$9,431.59 * 14	(\$132,042.26)
BASE COMMERCIAL ASSESSABLE WATER COST \$14,147.39 * 3	(\$42,442.17)
REMAINING ASSESSABLE AREA COSTS	<u>\$109,603.41</u>
ASSESSABLE ACREAGE (IN EXCESS OF 12 ACRES)	<u>79.48</u>
ASSESSMENT RATE PER ACRE	\$1,379.01/ACRE

III. WATER SERVICE ASSESSMENT RATE

TOTAL NON-COMMERCIAL ASSESSABLE WATER SERVICE COST	\$50,446
NON-COMMERCIAL BENEFITTED PROPERTIES/CONNECTIONS	14
WATER SERVICE COST PER NON-COMMERICAL PROPERTY	<u>\$3,603.29</u>
TOTAL COMMERCIAL ASSESSABLE WATER SERVICE COST	\$26,695
COMMERCIAL BENEFITTED PROPERTIES	3
WATER SERVICE COST PER COMMERCIAL PROPERTY	<u>\$8,898.33</u>

SUMMARY NOTES FOR WATER MAIN

1. All of the properties located along the route of the water main installed in this Project are “benefitted properties” under the applicable Wisconsin Statutes, and are accordingly being specially assessed for a part of the Project cost. The special assessments for each benefitted property are described in the Assessment Schedules attached to this Report.
2. The water main assessment calculations are based on (i) a base assessment for each property, up to and including the first 12 acres, and (ii) the balance of the specially assessed cost then being allocated on a per acre basis for each property in excess of 12 acres. Mapped wetland areas have been subtracted from the total acreage being assessed.
3. The water main assessment cost has been calculated by the District’s consulting engineers, based on recent past projects. An 8” water main is standard for municipal water service to the benefitted residential properties in this Project, and a 12” water main is standard for municipal water service to the benefitted commercial properties in this Project.
4. The District has paid for the additional oversizing costs of the 12” and 16” water mains that have been installed. The total cost of the Project, with oversizing, is estimated to be \$1,338,563 with special assessments paying for \$284,087.84 of the Project cost.
5. Recent project water assessments resulted in a residential water main assessment cost of \$9,431.59 per residential customer and \$14,147.39 per commercial customer. After the base assessment of \$9,431.59 is allocated to each of the residential benefitted properties and \$14,147.39 is allocated to each of the commercial benefitted properties, up to and including the first 12 acres, the balance of the total \$109,603.41 being specially assessed is then being allocated to all of the parcels having acreage in excess of 12 acres, on a per acre basis.
6. A total cost of \$50,446 is being allocated to the 14 existing residential homes/buildings located along the route of the installed water main for the cost of the water services (from the water main to the property line) provided to the 14 properties. That total cost is being divided equally among the 14 properties receiving the water services, with a resulting further special assessment to each of those 14 properties in the amount of \$3,603.29.
7. A total cost of \$26,695 is being allocated to the 3 commercial properties located along the route of the installed water main for the cost of the water services (from the water main to the property line) provided to the 3 properties. That total cost is being divided equally among the 3 properties receiving the water services, with a resulting further special assessment to each of those 3 properties in the amount of \$8,898.33.
8. Under the Caledonia ordinances, existing buildings are not required to be connected to the installed water main, and such an installation is discretionary with the property owner. Upon the occurrence of one of the below-described “trigger events”, however, the property owner will be required to timely pay the special assessment being levied on the property for the said water main, whether in one lump sum or in annual installment payments all as described below. Water service hook-up for new construction, however, is mandatory for new building facilities within 500’ of the water main or the right-of-way in which a water main is located.

9. Property owners that do connect to the installed water main will be responsible for the cost of (i) installing a water lateral from the lot line to the residence/building, (ii) making the interior plumbing connections in the residence/building, and (iii) abandoning and/or separating out the existing water well servicing the property. Future water main connections for which a water service is not being provided as a part of this Project will also involve the cost of connecting to the installed water main and running a water service to the property owner's lot line.
10. Property owners who connect to the water main will be able to keep their existing water well, if desired, for outdoor watering purposes. The plumbing served by the well will have to be separate from that connected to the public water system in the residence, however, and the DNR presently requires the testing of such a water well every five years.
11. Upon the occurrence of one of the "Trigger Events" described in below Paragraph 12, the property owner, whether a presently improved property or vacant-parcel property owner, shall pay the entire special assessment levied on the benefitted property in the manner described in below Paragraph 14.
12. Each one of the following events shall be a "Trigger Event" requiring the payment of the special assessment on the benefitted property, as described in above Paragraph 11:
 - a) A conveyance of the property. A "conveyance" of the property shall include (i) a sale of a part or all of the fee-simple title to the property; (ii) a lease of a part or all of the property in excess of One (1) Year; and/or (iii) if the property is owned by a Trust, corporation, limited liability company, partnership, or any other business entity, if there is a change of ownership and/or control of the said entity.

Special note: the following shall not be deemed a "conveyance", notwithstanding the forgoing provisions of this Paragraph 12 (a):

- 1) Leases in excess of One (1) Year if the use of the entire property is used for agricultural purposes or agricultural activities.
- 2) If the conveyance is a transfer of the interest in the property to a spouse, brother(s), sister(s), parent(s), child(ren) or grandchild(ren) of the owner (as of May 6, 2019) of the property, and/or a business entity described in this Paragraph 12 that is owned and/or controlled by the said transferee relative(s).
- 3) If the conveyance is (i) a transfer by a Trust to a Trustee(s) or a beneficiary(ies) of the Trust as named and/or designated in the Trust as of May 6, 2019, and/or (ii) a transfer of an equity and/or ownership interest in a corporation, limited liability company, partnership, or any other business entity that owns the said property as of May 6, 2019, provided the said conveyance is a transfer from the person/entity so owning the said equity and/or ownership interest to a related party. A "related party" for such purposes is hereby defined as a person that is a spouse, brother(s), sister(s), parent(s), child(ren), and/or grandchild(ren) of the owner of the said equity/ownership interest (as of May 6, 2019), and/or a business entity described above that is owned and/or controlled by the said transferee relative(s) described above.

- 4) A conveyance made through an eminent domain proceeding, and/or a voluntary transfer made as a negotiated transaction as a part of the said eminent domain proceeding.
 - b) A land division of the property, whether through a plat, certified survey map, or any other procedure that creates a new and/or an additional parcel(s) of land from the benefitted property.
 - c) Any development activity, of any kind, on the property for, or related to, residential, commercial, industrial, institutional, or any other non-agricultural purpose. Exceptions to this particular Trigger Event, however, shall be (i) agricultural activities, including the construction of agricultural buildings and/or any other agricultural structures, related to the growing of crops or other agricultural activities on the benefitted property; (ii) and/or a modification(s) to an existing single-family residence (in existence as May 6, 2019), and listed in Exhibit 2), or construction of, or modification(s) to, a related accessory structure for the said existing single-family residence.
 - d) The connection of the benefitted property to the water main and/or to a water service that is being constructed in this Project.
13. As of the date of May 6, 2019, all of the benefitted properties described in attached Exhibit 3 have been improved with a single-family residence (the “Presently-Improved Properties”) except for parcels #2 and #17, which are vacant lands. In the event that a Presently-Improved Property (listed on attached Exhibit 3) elects to connect to the Water main/Water Service within the next Twenty (20) Year time period that commences on July 1, 2021, then the property owner shall have the option to pay the special assessment levied on the said Presently-Improved Property in one of the ways described in below Paragraph 14. At such time(s) a benefitted vacant parcel of land experiences a trigger event, as defined in above Paragraph 12, that property owner(s) shall also have the option to pay the special assessment levied on that owner’s property in one of the ways described in below Paragraph 14.
14. A property owner of a Presently-Improved Property (and an owner of a vacant parcel, at the time of the occurrence of a Trigger Event, as described in above Paragraph 12), as described in above Paragraph 13, upon actual and operational connection of the Presently-Improved Property within Twenty (20) Years after the date of July 1, 2021, to the Water main/Water Service, may pay the special assessment on the said Presently-Improved Property in one of the following ways:
 - a) Within Sixty (60) Days after the date of the connection of the Presently-Improved Property to the Water main/Water Service, pay the entire amount of the special assessment, without interest, to the District/Village.
 - b) Pay the special assessment on the Presently-Improved Property in equal annual installments on the tax roll of the said property, plus interest accruing on the said special assessment at the rate of Three and One-Half Percent (3½ %) per annum from the date of connection until paid in full. The number of equal annual installment payments on the tax roll of the property shall be determined by the date on which the Presently-Improved Property is connected to the Water main/Water Service. The first year on the tax roll shall be (i) the tax year 2022, if the said connection is made on or before October 1 of that year, and (ii) if the connection is made after the date of October 1 of a given year (in, or after,

2022), then on the tax year that next follows the year of connection. The last year on the tax roll shall be the tax year 2041. (By way of example, if a connection is made on the date of July 1, 2022, then the payment of the special assessment may be placed on the tax roll of the Presently-Improved Property for the tax years 2022 through 2041, or in 20 equal annual installment payments. If the connection is made on October 30, 2022; however, then there would be an option to pay the special assessment in 19 equal installment payments, in tax years 2023 through 2041.) Essentially, for each year of the 20-year time period that lapses before the connection to the Water main/Water Service is made as described above, there will be a similar reduction in the number of years over which the special assessment may then be paid in equal annual installment payments on the tax roll of the Presently-Improved Property.

- c) If the special assessment on the Presently-Improved Property is placed on the tax roll of the property as described in above Subparagraph (b), the property owner may at any time pay the entire then-remaining balance of the special assessment, plus accrued interest, to the District/Village.

15. If the property owner of a Presently-Improved Property (as described above in Paragraph 13) does not actually connect to the Water main/Water Service during the 20-year period described above, then the option to pay the special assessment as described in above Paragraph 13 and Subparagraph 14(b) shall automatically become null and void. The provisions contained in above Subparagraph 14(a) shall then exclusively control. The 20-year payment plan, described in above Subparagraph 14(b), for a benefitted vacant parcel which experiences a Trigger Event, as described in above Paragraph 12, shall commence on the date of the Trigger Event, provided that a Trigger Event occurs on or before October 1, 2041. If the said Trigger Event occurs after the date of October 1, 2041, then the option to pay the special assessment as described in above Paragraph 13 and Subparagraph 14(b) shall automatically become null and void. The provisions contained in above Subparagraph 14(a) shall then exclusively control.
16. In addition to the assessed amount for water main and service, each vacant parcel of property (being parcels #2 and #17) will need to pay impact fees in the amount of \$1,550.00 per residential equivalent unit (REU) in accordance with Section 9-1-56 of the Village of Caledonia Ordinances. A $\frac{3}{4}$ inch (or less) water meter is determined to be the service required for the standard REU. Nonresidential buildings shall be assigned a number of REUs based on the size and type of water meter that are installed. Meter sizes and REU ratios will be in accordance with Section 9-1-56 of the Ordinance. These impact fees shall be paid upon the issuance of a building permit by the Village for connection to the water main or within six (6) months from the date the owner or occupant of the property receives written notice from the Village or District as detailed in Section 9-1-57 of the Ordinance. An excerpt of the current Village of Caledonia Ordinances are attached as Exhibit 1. If, in the future, these Ordinances are amended or modified, and/or successor Ordinances are enacted, then the terms and provisions of the amended/modified/successor Ordinances shall apply.
17. Special Provisions regarding other possible land divisions.
 - A. When and if any other benefitted property owner listed in attached Exhibit 2 does a land division of any nature prior to the levy of the special assessments described in this Report, then the special assessment to be levied on the original benefitted parcel, but now divided

in some manner, is being levied in full, jointly and severally, on each of the said separate subdivided parcels of land (that together comprise the original benefitted parcel). Any payment(s) of the special assessment so levied on each of the subdivided parcels shall be a credit to all of the said subdivided parcels.

- B. When and if any other benefitted property owner listed in attached Exhibit 6 does a land division of any nature prior to the levy of the special assessments described in this Report, then the special assessment to be levied on the original benefitted parcel, but now divided in some manner, is being levied in full, jointly and severally, on each of the said separate subdivided parcels of land (that together comprise the original benefitted parcel). Any payment(s) of the special assessment so levied on each of the subdivided parcels shall be a credit to all of the said subdivided parcels.
- C. Notwithstanding any levy against one or multiple parcels of land due to a land division as described above under Paragraph 17, the Village will not recognize as legal any land divisions that are accomplished in violation of the requirements of the Village's Code of Ordinances and applicable Wisconsin Statutes. The Village does not waive any requirements of its ordinances by levying any assessments as provided for in this report. The Village reserves all rights to enforce its ordinances, including, but not limited to, the right to issue citations for an ordinance violation, to withhold the issuance of permits and licenses for the parcel of land, and to seek injunctive relief requiring compliance with the Village's ordinances.

EXHIBIT 1

SEC. 9-1-55 STANDARD SPECIFICATIONS.

All water-related work and materials used must comply with the Utility District Standard Specifications (“Standard Specifications”), as adopted and amended from time-to-time by the Commission. The District Manager may issue written waivers to the Standard Specifications, in his/her discretion.

SEC. 9-1-56 IMPACT FEES.

- (a) **Purpose.** The purpose of this section is to promote the public health, safety, and general welfare of the community and to facilitate the adequate provision of water utility facilities by imposing Impact Fees upon Developers to pay for the Capital Costs that are necessary to accommodate Land Development.
- (b) **Public Facilities Needs Assessment.** In accordance with Section 66.0617(4) of the Wisconsin Statutes, the Village of Caledonia has prepared a needs assessment report regarding selected Public Facilities for which Impact Fees may be imposed. A copy of the report “Water Impact Fee Needs Assessment Update for the Village of Caledonia Water Utility District” dated January 2009 (hereinafter the “Needs Assessment Report”) is on file and available for public inspection in the Office of the Village Clerk and made a part of this ordinance by reference. References to Public Facilities in this section shall be deemed to refer to the new water facilities identified in Table 3-5 of the Needs Assessment Report, to the extent that their inclusion is permitted under Wisconsin Statutes Section 66.0617.
- (c) **Establishment of Service Area.** There is hereby established a geographically defined area which shall be known as the “Service Area” within which it will be necessary to enlarge and improve new or existing Public Facilities attendant to the Village’s water system as a result of Land Development and growth within the Village. The Service Area for the water system impact fee is the Water Needs Assessment Boundary shown in Exhibit 1 of the Needs Assessment Report.
- (d) **Definitions.** The definitions set forth in Section 66.0617(1) of the Wisconsin Statutes, and any amendments thereto, are incorporated and made a part of this ordinance as though fully set forth herein. Those definitions include, without limitation, the following:
 - 1. **Capital Costs** means the capital costs to construct, expand or improve public facilities, including the cost of land, and including legal, engineering and design costs to construct, expand or improve public facilities, except that not more than 10% of capital costs may consist of legal, engineering and design costs unless the municipality can demonstrate that its legal, engineering and design costs which relate directly to the public improvement for which the impact fees were imposed exceed 10% of capital costs. "Capital costs" does not include other noncapital costs to construct, expand or improve public facilities, vehicles; or the costs of equipment to construct, expand or improve public facilities.
 - 2. **Developer** means a person that constructs or creates a land development.
 - 3. **Impact Fees** means cash contributions, contributions of land or interests in land or any other items of value that are imposed on a developer by a municipality under this section.
 - 4. **Land Development** means the construction or modification of improvements to real property that creates additional residential dwelling units within a municipality

EXHIBIT 1

or that results in nonresidential uses that create a need for new, expanded or improved public facilities within a municipality.

5. **Public Facilities** means...facilities for pumping, storing, and distributing water.
6. **Service Area** means a geographic area delineated by a municipality within which there are public facilities.
- (e) **Imposition of Impact Fees.** Impact Fees are hereby imposed on all Land Developments within the Village.
- (f) **Collection.** Impact Fees shall be payable by the Developer or the property owner in full upon the issuance of a building permit by the Village.
- (g) **Fee Schedule.** The water Impact Fee is adopted in the following amount: \$1,550.00 per standard residential equivalent unit (“REU”).
 - (1) A 3/4-inch (or less) water meter is determined to be the service required for the standard REU. Each single-family residential unit, whether located within a one-family, multi-family, condominium, cooperative, rental or owner-occupied building, shall constitute one such REU.
 - (2) Non-residential buildings shall be assigned a number of REUs based on the size and type of water meter(s) that are installed in the building. The following table sets forth the REUs based on meter sizes:

REU Ratio Based on Meter Size			
<u>Meter Size (inches)</u>	<u>Meter Type</u>	<u>Flow (gpm)</u>	<u>REU Ratio</u>
3/4 or less	Displacement	15	1.0
1	Displacement	25	2.5
1-1/2	Displacement	50	5.0
2	Displacement	80	8.0
2	Compound	80	8.0
2	Turbine – C11	80	8.0
2	Turbine – C12	100	10.0
3	Compound	160	16.0
3	Turbine - C11	175	17.5
3	Turbine - C12	240	24.0
4	Compound	250	25.0
4	Turbine - C11	300	30.0
4	Turbine - C12	420	42.0
6	Compound	500	50.0
6	Turbine - C11	625	62.5
6	Turbine - C12	920	92.0
8	Compound	800	80.0
8	Turbine - C11	900	90.0
8	Turbine - C12	1,600	160.0
10	Compound	1,150	115.0
10	Turbine - C11	1,450	145.0
10	Turbine - C12	2,500	250.0
12	Turbine - C11	2,150	215.0
12	Turbine - C12	3,300	330.0

EXHIBIT 1

In some types of non-residential buildings, only water for fire protection is needed. In these cases, or similar cases, the Utility District Commission may adjust the number of REUs assigned to that building, if appropriate documentation is provided by the owner. In these cases, the REUs may be calculated by the square feet of building space per meter size, with a standard of one REU equals 2500 square feet of building space. The method which provides the greatest financial impact to the Utility shall be utilized.

(h) **Reduction of Impact Fees.**

- (1) The Impact Fees imposed by this ordinance shall be reduced to compensate for other Capital Costs imposed by the Village with respect to Land Development to provide or pay for Public Facilities, including special assessments, special charges, land dedications or fees in lieu of land dedications under Wisconsin Statutes Chapter 236, or any other items of value.
- (2) The Impact Fees imposed by this ordinance shall be reduced to compensate for moneys received from the federal or state government specifically to provide or pay for the Public Facilities for which the Impact Fees are imposed.

(i) **Exemptions.** The following shall be exempted from the payment of Impact Fees provided a claim of exemption shall be made at the time of application for building permit.

- (1) Alterations or expansions of existing buildings, where no additional or larger water meter connections are requested or required and where the use of the property is not changed.
- (2) The replacement of a building or structure with a new building or structure of the same or less size, where no additional or larger water meter connections are requested or required and where the use of the property is not changed.

Any claim not so made shall be deemed waived.

(j) **Low-cost Housing.** No exemption or reduction shall be made for a Land Development that provides for low-cost housing.

(k) **Impact Fee Accounting.** The Village shall keep accurate accounting records for all Impact Fee revenues collected for each given year. All Impact Fee revenues shall be deposited in a segregated interest bearing account, and shall be accounted for separately from the other funds of the Village. All Impact Fee revenues and the interest earned on said Impact Fee revenues, shall only be used to pay for the Capital Costs of Public Facilities that are necessary to accommodate Land Development and that are identified in the Needs Assessment Report. The revenue and expenditures totals for Impact Fees shall be included in the Village's annual budget, and a summary of the revenues and expenditure totals shall be set forth in the Village's annual budget summary required under §65.90 of the Wisconsin Statutes.

(l) **Refund Procedure.** Any Impact Fee revenues that are not used within seven (7) years after they are collected to pay for the Capital Costs for which they were imposed shall be refunded to the current owner of the property with respect to which said Impact Fees were imposed, along with any interest that has accumulated thereon. The Village Board determines that seven (7) years is an appropriate period of time for the planning and financing of the public facilities for which the Impact Fees are imposed. The seven (7) year time limit for using Impact Fee revenues may be extended for three (3) years if the Village adopts a resolution stating that, due to extenuating circumstances of hardship in meeting the seven (7) year limit, the Village needs an additional three (3) years to use the Impact

EXHIBIT 1

Fee revenues that were collected. Said resolution shall specify the extenuating circumstances or hardship that led to the need to adopt said resolution. Impact fees shall also be refunded to the current owner of the property upon the lapse of a building permit, within the meaning of Section 15-1-7, provided that construction has not yet commenced under the permit.

- (m) **Appeal Procedure.** A Developer upon whom an Impact Fee is imposed may, within thirty (30) days of the initial determination of the Impact Fee, contest the amount, collection or use of the impact fee by filing a request for review of the determination in accordance with Title 4 Chapter 1 of the Village's Code of Ordinances with the Secretary of the Utility Commission and the Village Clerk, specifying the basis upon which the review is sought.
- (n) **Severability.** If any portion of this ordinance is declared illegal or invalid for any reason, that illegality or invalidity shall not affect the remaining legal and valid portions of this ordinance, which shall remain in full force and effect.

SEC 9-1-57. MANDATORY CONNECTION TO WATER MAINS

(a) **Definitions.**

Accessory Use or Structure shall mean a use or detached structure subordinate to the principal use of a structure, land or water and located on the same lot or parcel, serving a purpose customarily incidental to the principal structure.

Building shall mean a structure having a roof supported by columns or walls used or intended to be used for the shelter or enclosure of persons, animals, equipment, machinery, or materials.

Land Split shall have the same meaning as defined in Sec. 14-1-2(c) of this Code of Ordinances.

Subdivision shall have the same meaning as defined in Sec. 14-3-2(x) of this Code of Ordinances.

(b) **Compulsory Connection for New Buildings.**

(1) **Residential and Agricultural Use.** Any Building in a residential or agricultural zoning district constructed within the boundaries of the Utility shall connect to a water main at the expense of the Building's owner if any part of the Building is within 500 feet of a water main or the right-of-way in which a water main is located. Mandatory connection is required, regardless of Building distance, for Subdivisions and Land Splits pursuant to Sec. 14-3-4(c)(6) of the Code of Ordinances. Any Building upon a parcel for which a conditional use permit is granted shall comply with the connection requirements of 9-1-53(b)(2) below.

(2) **Other Use.** A Building zoned for any other purpose that is constructed within the boundaries of the Utility District shall connect to a water main at the expense of the Building's owner if any part of the parcel, upon which the Building is located, is within 500 feet of a water main or the right-of-way in which a water main is located.

(c) **Compulsory Connection for Existing Buildings.**

(1) **Residential and Agricultural Use.** Any existing Building in a residential or agricultural zoning district and located within the boundaries of the Utility shall connect to a water main at the expense of the Building's owner if the Building is

EXHIBIT 1

located within 500 feet of a water main or the right-of-way in which a water main is located, and any of the following apply:

- (a) The parcel, upon which the Building is located, is rezoned or a conditional use permit is granted;
 - (b) The parcel, upon which the Building is located, is divided pursuant to Title 14 of the Code of Ordinances for the Village of Caledonia; or
 - (c) A well serving the existing Building fails or must be abandoned.
- (2) **Other Use.** An existing Building zoned for any other purpose and located within the boundaries of the Utility District shall connect to a water main at the expense of the Building's owner if the parcel, upon which the Building is located, is within 500 feet of a water main or the right-of-way in which a water main is located, and any of the following apply:
- (a) The parcel, upon which the Building is located, is rezoned or a conditional use permit is granted;
 - (b) The parcel, upon which the Building is located, is divided pursuant to Title 14 of the Code of Ordinances for the Village of Caledonia; or
 - (c) A well serving the existing Building fails or must be abandoned.
- (d) **Time to Connect and Payment of Impact Fee.**
The connection shall be made within six (6) months from the date the owner or occupant of the property receives written notice from the Village or District that a water main is available to serve the property. The applicable impact fee, shall be paid to the Village in accordance with Section 9-1-52 and Wis. Stats. Section 66.0617, as those sections may be amended from time-to-time.
- (e) **Repair and Maintenance.**
The property owner shall be responsible for all repair, replacement, and maintenance costs associated with the lateral from the curb stop to the Building being served.
- (f) **Exemption.**
This section shall not apply to a Building which constitutes an Accessory Use or Structure.
- (g) **Appeals, Modifications or Waivers.**
Any person affected by any decision, action, or determination made pursuant to this section may take an appeal, or seek a modification or waiver, in accordance with Title 4 of the Code of Ordinances. Mandatory connection requirements may be waived by the Village, upon request by the Utility or the property owner, on a case-by-case basis (e.g., where a water main is extended past existing structures as part of a “water looping” project). The Village may request the Utility to review any request for a waiver by a property owner and provide the Village with a recommendation, including a report on any impacts of such waiver on the Utility

EXHIBIT 2
DEBACK PHASE III ASSESSMENT SCHEDULE
WATERMAIN EXTENSION PROJECT
VILLAGE OF CALEDONIA
SEPTEMBER 13, 2021

Parcel No.	Taxkey	Property Owner Name	Physical Address	Mailing Address	City	State	Zip Code	Acreage*	Base Assessment Amount	Water Payment (Based on Acreage)	Existing Building Water Service	Assessment Reduction	Total Water Payment	
1	104-04-22-30-020-000	Four Mile Rd LLC	13623 4 Mile Rd	PO Box 274	Franksville	WI	53126	2.27	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
2	104-04-22-30-015-202	Wispark LLC	Adams Rd	231 West Michigan St P423	Milwaukee	WI	53203	58.40	\$14,147.39	\$63,985.88	\$8,898.33	(\$6,061.32)	\$80,970.28	
3	104-04-22-30-015-201	Central Storage & Warehouse Company	4 Mile Rd	231 West Michigan St P423	Milwaukee	WI	53203	8.11	\$14,147.39		\$8,898.33	(\$6,061.32)	\$16,984.40	
4	104-04-22-19-073-000	Jpeter Group Inc	12604 4 Mile Rd					0.46	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
5	104-04-22-19-072-000	Shirley J Lochowitz	12616 4 Mile Rd					1.04	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
6	104-04-22-19-074-000	Mark & Debra Hammond	12628 4 Mile Rd					1.00	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
7	104-04-22-19-075-000	Thomas E Michels	12708 4 Mile Rd					1.00	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
8	104-04-22-19-071-000	Darlene Daines	13010 4 Mile Rd					31.06	\$9,431.59	\$26,283.86	\$3,603.29	(\$6,061.32)	\$33,257.42	
9	104-04-22-19-068-000	Jpeter Group Inc	13046 4 Mile Rd	2426 East College Ave	Cudahy	WI	53110	8.33	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
10	104-04-22-19-069-000	Roman V & Louise Kerkman	13108 4 Mile Rd					2.00	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
11	104-04-22-19-067-000	Mark G Gracyalny	13140 4 Mile Rd					22.88	\$9,431.59	\$15,003.59	\$3,603.29	(\$6,061.32)	\$21,977.15	
12	104-04-22-19-063-020	Shawn Utphall & Tracy Johanneck	13332 4 Mile Rd					2.01	\$9,431.59		\$7,206.58	(\$6,061.32)	\$10,576.85	
13	104-04-22-19-063-010	Janet & Felipe I Avendano	13410 4 Mile Rd					2.90	\$9,431.59	\$0.00	\$3,603.29	(\$6,061.32)	\$6,973.56	
14	104-04-22-19-066-000	DEMF Transition Trust 11/13/13	13414 4 Mile Rd					1.02	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
15	104-04-22-19-065-000	Michele Miller, Miller 2014 Joint Rev Trust Dated 02/28/2014	13420 4 Mile Rd					1.02	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
16	104-04-22-19-064-000	William J & Judith Hurtienne	13510 4 Mile Rd					0.50	\$9,431.59		\$3,603.29	(\$6,061.32)	\$6,973.56	
17	104-04-22-19-063-030	Michael Dwyer Holding LLC	4 Mile Rd	2410 South Stoughton Rd	Madison	WI	53716	15.14	\$14,147.39	\$4,330.08	\$8,898.33	(\$6,061.32)	\$21,314.48	
								Average:	9.36		\$21,920.68			\$15,399.39
								Total:	159.14	\$174,484.43	\$109,603.41	\$80,744.34	(\$103,042.50)	\$261,789.68

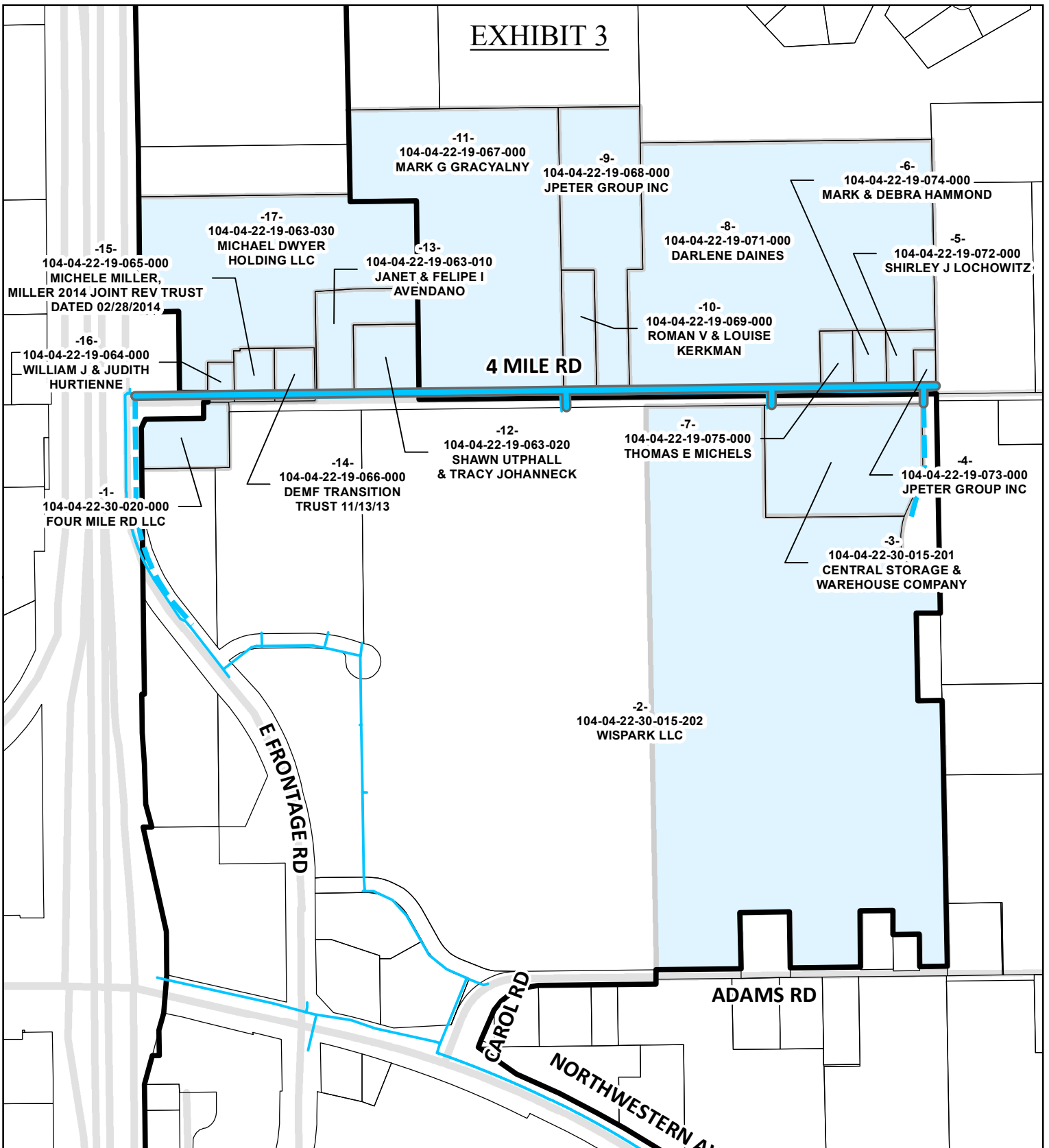
Notes: Property data gathered from the Racine County GIS Map Site or certified survey map, except where indicated.

* Acreage excludes mapped 2010 WDNR wetland data.

Property has 2 homes that need services, so the lateral costs have been doubled.

1. Watermain assessment payment for non-commercial properties of \$9,431.59 is based on CTH K assessments and 8" equivalent main adjusted to June 2018 values.
2. Watermain assessment payment for commercial properties of \$14,147.39 is based on CTH K assessment amount upsized for a 12" equivalent main adjusted to June 2018 values.
3. Total water main cost for DeBack Phase III based on estimate of \$1,338,563 developed from recent bid information.
4. Water payment based on assessable amount of \$109,603.41 divided by acreage, after applying water main assessment of \$9,431.59 for each non-commercial property and \$14,147.39 for each commercial property.
5. Costs for water services are in addition to the total assessment cost for each property.
6. Water service costs for non-commercial property based on total lineal footage of 390 LF at a cost of \$50,446/14 properties = \$3,603.29 for each property.
7. Water service costs for commercial property based on total lineal footage of 225 LF at a cost of \$26,695/3 properties = \$8,898.33 for each property.
8. Water assessment reduced by \$6,061.32 per property per Village Board on July 19, 2021

EXHIBIT 3



Village of Caledonia

TID 4: Phase 3 Utility Improvements Benefited Properties 4 Mile Road Water

Q:\Caledonia Utility District\18C030.04 - TID #4 Phase 3 Utility Improvements\GIS\mxd\18C030.04 4 Mile Rd Improvements Benefited Properties 06142018.mxd

February 2021



- Proposed Water Main - Assessable
- Proposed Water Main - Not Assessable
- Existing Water Main
- TID 4 Boundary
- Parcels
- Roads
- Benefited Property

EXHIBIT 4

BELL RD

4 MILE RD

16"

16"

E FRONTAGE RD

CAROL RD

ADAMS RD

NORTHWESTERN AVE

SUNFLOWER DR



RAYMOND
E CALEDONIA

V

- Proposed Water Main - Assessable
- Proposed Water Main - Not Assessable
- Existing Water Main

- TID 4 Boundary
- Parcels
- Roads

Village of Caledonia

TID 4: Phase 3 Utility Improvements Proposed Assessable Improvements 4 Mile Road Water

Q:\Caledonia Utility District\16C030.04 - TID #4 Phase 3 Utility Improvements\GIS\mxd\16C030.04 4 Mile Rd Improvements Assessable Improvements 06142018.mxd

May 2019

0 300 600 1,200 Feet



SCHEDULE E

PLANS AND SPECIFICATIONS FOR SEWER MAIN

There is on file in the office of the Village Clerk, a set of plans and specifications for the construction project, which are available for review during business hours. Said plans and specifications are hereby incorporated into this report by reference. The route of the sewer main for the municipal project is shown on Exhibit 7.

SCHEDULE F
DeBack Phase III Extension Special Assessments
Construction Cost & Assessable Sewer Main Estimate
Village of Caledonia

May 7, 2019

Description	Estimated Quantity	Unit	Estimated Unit Price	Total Amount
Sanitary Sewer				
Mobilization/Demobilization	1	LS	\$210,000.00	\$210,000
Clear and Grub	1	LS	\$1.00	\$1
Stripping and Stockpiling Topsoil	1	LS	\$60,000.00	\$60,000
Remove and Replace Signing	1	LS	\$3,000.00	\$3,000
Revoove and Replace Postal Boxes	1	LS	\$3,600.00	\$3,600
Silt Fence	8,220	LF	\$2.00	\$16,440
Tree Removal	112	ID	\$25.00	\$2,805
Inlet Protection	6	EA	\$100.00	\$600
Rock Filled Filter Bag	60	EA	\$13.00	\$780
Traffic Control	1	LS	\$30,000.00	\$30,000
Sawcut Pavement, Full Depth	2,040	LF	\$2.00	\$4,080
Topsoil, Seed, Fertilizer, and Erosion Mat	32,400	SY	\$5.00	\$162,000
30-inch FRPMP Gravity Sewer (spoil backfill)	3,637	LF	\$420.00	\$1,527,540
30-inch FRPMP Gravity Sewer (granular backfill)	93	LF	\$800.00	\$74,400
30-inch FRPMP Gravity Sewer (borrow backfill)	144	LF	\$520.00	\$74,880
12-inch PVC SDR 26 Gravity Sewer (spoil backfill)	1,077	LF	\$250.00	\$269,250
8-inch PVC SDR 26 Gravity Sewer (spoil backfill)	1,915	LF	\$300.00	\$574,500
8-inch PVC SDR 26 Gravity Sewer (granular backfill)	149	LF	\$500.00	\$74,500
6" PVC Sewer Lateral Riser	153	VF	\$290.00	\$44,370
Sanitary Manhole, 72-inch diameter	95	VF	\$800.00	\$76,000
Sanitary Manhole, 60-inch diameter	150	VF	\$700.00	\$105,000
Sanitary Manhole, 48-inch diameter	176	VF	\$500.00	\$88,000
Salvage & Reinstall 42-inch RCP Culvert and End Section	2	EA	\$4,000.00	\$8,000
Salvage & Reinstall 30-inch RCP Culvert and End Section	2	EA	\$2,000.00	\$4,000
Salvage & Reinstall 18-inch RCP Culvert and End Section	3	EA	\$1,500.00	\$4,500
Salvage & Reinstall CMP Culvert	6	EA	\$1,500.00	\$9,000
Tree Plantings	8	EA	\$750.00	\$6,000
Sanitary Sewer Service Pumping	1	EA	\$48,000.00	\$48,000
Connect to Existing Sanitary	2	LS	\$2,000.00	\$4,000
Estimated DeBack Phase III Sanitary Main Cost				\$3,485,246
Estimated Design Engineering				\$278,820
Estimated Construction Administration Cost				\$278,820
DEBACK PHASE III EXTENSION SEWER MAIN TOTAL				\$4,042,885
Residential Sewer Main Assessment (\$10,440.30 * 14)				\$146,164
Commercial Sewer Main Assessment (\$15,633.14 * 3)				\$46,899
Total Sewer Main Assessment				\$193,064

1. Costs based on low bid received 10-09-18 for the DeBack Industrial Park Phase III Utility Improvements Project.
2. Sewer main assessment payment of \$10,440.30 for residential properties based on \$65/front foot multiplied by a minimum lot frontage of 150' adjusted for future costs.
3. Sewer main assessment payment of \$15,633.14 for commercial properties based on \$97.33/front foot multiplied by a minimum lot frontage of 150' adjusted for future costs.
4. No lateral costs are included in the above estimate. These costs will be assessed, however, in addition to the costs outlined on the above assessment schedule.
5. Sewer lateral riser costs are covered 100% by the Village of Caledonia as part of the regional oversizing costs.
6. To calculate the Caledonia portion, \$55/LF was used as the unit price of an 8-inch gravity sewer, \$400/LF was used as the unit price for the boring and casing pipe for 8" sewer, and \$500/VF was used as the unit price for a 48-inch sanitary manhole. Those unit costs are based on an engineer's estimate and are used to calculate the assessment cost for both sewer and manholes.
7. Assessable amounts based on previous assessed projects. The final assessments will be administratively reduced, per the Wisconsin statutes, if the final costs are less than the estimated cost used in this Report.

SCHEDULE G
DeBack Phase III Extension Special Assessments
Construction Cost & Assessable Sewer Lateral Estimate
Village of Caledonia

May 7, 2019

Description	Estimated Quantity	Unit	Estimated Unit Price	Total Amount	Assessment	Oversizing Portion
Sewer Lateral - Residential						
6-inch PVC Sewer Lateral	938	LF	\$290	\$272,020	\$109,760	\$162,260
Estimated DeBack Phase 3 Residential Sewer Lateral Subtotal				\$272,020	\$109,760	\$162,260
Estimated Design Engineering				\$21,762	\$2,177	\$19,585
Estimated Construction Administration Cost				\$21,762	\$2,177	\$19,585
DEBACK PHASE 3 RESIDENTIAL SEWER LATERAL SUBTOTAL				\$315,543	\$114,100	\$201,443
Sewer Lateral - Commercial						
8-inch PVC SDR 26 Gravity Sewer (granular backfill)	78	LF	\$500	\$39,000	\$10,530	\$28,470
6-inch PVC Sewer Lateral	29	LF	\$290	\$8,410	\$2,245	\$6,165
8-inch PVC Sewer Lateral	29	LF	\$500	\$14,500	\$3,915	\$10,585
Estimated DeBack Phase 3 Commercial Sewer Lateral Subtotal				\$61,910	\$16,690	\$45,220
Estimated Design Engineering				\$4,953	\$495	\$4,458
Estimated Construction Administration Cost				\$4,953	\$495	\$4,458
DEBACK PHASE 3 COMMERCIAL SEWER LATERAL SUBTOTAL				\$71,816	\$17,680	\$54,136

1. Costs based on low bid received 10-09-18 for the DeBack Industrial Park Phase III Utility Improvements Project.

SCHEDULE H

CALCULATION OF THE SEWER MAIN ASSESSMENT RATES

TOTAL SEWER MAIN PROJECT CONSTRUCTION COST \$3,485,246

I. COST SHARING SUMMARY

TOTAL PROJECT CONSTRUCTION COST	\$3,485,246
DESIGN & CONSTRUCTION ENGINEERING	\$557,640
REGIONAL OVERSIZING COST	(\$2,935,887)
NON ASSESSABLE SEWER MAIN	(\$503,674)
NET ASSESSABLE SEWER COSTS	<u>\$603,325</u>

II. SEWER MAIN ASSESSMENT RATE

TOTAL ASSESSABLE SEWER COST	\$603,325.15
BASE RESIDENTIAL ASSESSABLE SEWER COST \$10,440.30*14	(\$146,164.20)
BASE COMMERCIAL ASSESSABLE SEWER COST \$15,633.14*3	(\$46,899.42)
REMAINING ASSESSABLE AREA COSTS	<u>\$410,261.53</u>
ASSESSABLE ACREAGE (IN EXCESS OF 12 ACRES)	79.48
ASSESSMENT RATE PER ACRE	<u>\$5,161.82/ACRE</u>

III. SEWER LATERAL ASSESSMENT RATE

TOTAL ASSESSABLE RESIDENTIAL SEWER LATERAL COST	\$114,100
BENEFITTED PROPERTIES/CONNECTIONS	<u>14</u>
RESIDENTIAL SEWER LATERAL COST PER PROPERTY	<u>\$8,150.00</u>
TOTAL ASSESSABLE COMMERCIAL SEWER LATERAL COST	\$17,680
BENEFITTED PROPERTIES/CONNECTIONS	<u>3</u>
COMMERCIAL SEWER LATERAL COST PER PROPERTY	<u>\$5,893.33</u>

SUMMARY NOTES FOR SEWER MAIN

1. All of the properties located along the route of the sanitary sewer main installed in this Project are “benefitted properties” under the applicable Wisconsin Statutes, and are accordingly being specially assessed for a part of the Project cost. The special assessments for each benefitted property are described in the Assessment Schedules attached to this Report.
2. The sanitary sewer assessment calculations are based on (i) a base assessment for each property, up to and including the first 12 acres, and (ii) the balance of the specially assessed cost then being allocated on a per acre basis for each property in excess of 12 acres. Mapped wetland areas have been subtracted from the total acreage being assessed.
3. The sanitary sewer assessment cost has been calculated by the District’s consulting engineers, based on the estimated cost of installing an 8” sanitary sewer main, which is the minimum size sanitary sewer allowable to serve the benefitted properties. The District will be paying for the additional oversizing cost of the 30” sanitary sewer mains. The entire cost for the sanitary sewer mains and related infrastructure, with the oversizing costs, was estimated to be \$4,042,885. Of that total amount, \$603,325.15 of the Project cost will be specially assessed against the benefitted property owners as described below (based on the estimated 8” sewer cost along the entire route of the installed sanitary sewer main, as described above).
4. A base sanitary sewer assessment in the amount of \$10,440.30 is being allocated to each of the non-commercial benefitted properties. This base special assessment amount was calculated based on a minimum lot frontage of 150’ for A-2 zoning, which is the zoning of the majority of the benefitted properties. Using this deemed 150’ of frontage for each of the benefitted properties (no matter what the actual frontage of each property is), the 150’ frontage has been multiplied by \$65 per front foot, which is the cost per foot for one side of the road based on recent construction projects, and increased based on the Engineering News Record indices. This calculation results in the base assessment amount of \$10,440.30 for non-commercial properties.
5. A base sanitary sewer assessment in the amount of \$15,633.14 is being allocated to each of the commercial benefitted properties. This base special assessment amount was calculated based on a minimum lot frontage of 150’ for A-2 zoning, which is the zoning of the majority of the benefitted properties. Using this deemed 150’ of frontage for each of the benefitted properties (no matter what the actual frontage of each property is), the 150’ frontage has been multiplied by \$97.33 per front foot, which is the cost per foot for one side of the road based on recent construction projects, and increased based on the Engineering News Record indices. This calculation results in the base assessment amount of \$15,633.14 for commercial properties.
6. After the base assessment of \$10,440.30 is allocated to each of the non-commercial benefitted properties and the base assessment of \$15,633.14 is allocated to each of the commercial benefitted properties, up to and including the first 12 acres, the balance of the total \$410,261.53 being specially assessed is then being allocated to the parcels having acreage in excess of 12 acres, on a per acre basis.
7. A total cost of \$114,100 is being allocated to the 14 existing residential homes/buildings located along the route of the installed sewer main for the cost of the sewer services provided to the 14 properties. That total cost is being divided equally among the 14 properties receiving the sewer

services, with a resulting further special assessment to each of those 14 properties in the amount of \$8,150.00.

8. A total cost of \$17,680 is being allocated to the 3 commercial properties located along the route of the installed sewer main for the cost of the sewer services provided to the 3 properties. That total cost is being divided equally among the 3 properties receiving the sewer services, with a resulting further special assessment to each of those 3 properties in the amount of \$5,893.33.
9. Under the Caledonia ordinances, existing buildings are required to be connected to the installed sanitary main. As part of this special assessment, the Village Board has allowed the affected properties to make such an installation discretionary. Upon the occurrence of one of the below-described “trigger events”, however, the property owner will be required to timely pay the special assessment being levied on the property for the said sanitary main, whether in one lump sum or in annual installment payments all as described below. Sanitary service hook-up for new construction, however, is mandatory for new building facilities within 500’ of the sanitary main or the right-of-way in which a sanitary main is located.
10. Property owners that do connect to the installed sanitary main will be responsible for the cost of (i) installing a sanitary lateral from the lot line to the residence/building and (ii) making the interior connections in the residence/building. Future sanitary main connections for which a sanitary service is not being provided as a part of this Project will also involve the cost of connecting to the installed sanitary main and running a sanitary service to the property owner’s lot line. (iii) Abandonment of the existing private on-site sewerage system as necessary.
11. Upon the occurrence of one of the “Trigger Events” described in below Paragraph 12, the property owner of a Not Presently-Improved Property shall pay the entire special assessment levied on the benefitted property in the manner described in below Paragraph 14.
12. For the Not Presently-Improved Properties, each one of the following events shall be a “Trigger Event” requiring the payment of the special assessment on the benefitted property, as described in above Paragraph 11:
 - a) A conveyance of the property. A “conveyance” of the property shall include (i) a sale of a part or all of the fee-simple title to the property; (ii) a lease of a part or all of the property in excess of One (1) Year; and/or (iii) if the property is owned by a Trust, corporation, limited liability company, partnership, or any other business entity, if there is a change of ownership and/or control of the said entity.

Special Note: the following shall not be deemed a “conveyance”, notwithstanding the forgoing provisions of this Paragraph 12 (a):

- 1) Leases in excess of One (1) Year if the use of the entire property is used for agricultural purposes or agricultural activities.
- 2) If the conveyance is a transfer of the interest in the property to a spouse, brother(s), sister(s), parent(s), child(ren) or grandchild(ren) of the owner (as of May 6, 2019) of the property, and/or a business entity described in this Paragraph 12 that is owned and/or controlled by the said transferee relative(s).

- 3) If the conveyance is (i) a transfer by a Trust to a Trustee(s) or a beneficiary(ies) of the Trust as named and/or designated in the Trust as of May 6, 2019, and/or (ii) a transfer of an equity and/or ownership interest in a corporation, limited liability company, partnership, or any other business entity that owns the said property as of May 6, 2019, provided the said conveyance is a transfer from the person/entity so owning the said equity and/or ownership interest to a related party. A “related party” for such purposes is hereby defined as a person that is a spouse, brother(s), sister(s), parent(s), child(ren) and/or grandchild(ren) of the owner of the said equity/ownership interest (as of May 6, 2019), and/or a business entity described above that is owned and/or controlled by the said transferee relative(s) described above.
 - 4) A conveyance made through an eminent domain proceeding, and/or a voluntary transfer made as a negotiated transaction as a part of the said eminent domain proceeding.
 - b) A land division of the property, whether through a plat, certified survey map, or any other procedure that creates a new and/or an additional parcel(s) of land from the benefitted property.
 - c) Any development activity, of any kind, on the property for, or related to, residential, commercial, industrial, institutional, or any other non-agricultural purpose. Exceptions to this particular Trigger Event, however, shall be (i) agricultural activities, including the construction of agricultural buildings and/or any other agricultural structures, related to the growing of crops or other agricultural activities on the benefitted property; (ii) and/or a modification(s) to an existing single-family residence (in existence as of May 6, 2019) and listed in Exhibit 6), or construction of, or modification(s) to, a related accessory structure for the said existing single-family residence.
 - d) The connection of the benefitted property to the sewer main and/or to a sewer lateral that is being constructed in this Project.
13. As of the date of May 6, 2019, all of the benefitted properties described in attached Exhibit 6 have been improved with a single-family residence (the “Presently-Improved Properties”) except for parcels #2 and #17, which are vacant lands. Attached as Exhibit 9 is an excerpt of the Village of Caledonia Code of Ordinances, being Section 9-4-6 (the “Ordinance”) which pertains to mandatory connection requirements for sanitary sewer. Under this Ordinance, the Presently-Improved Properties described in Exhibit 6 will be required to connect to the sanitary sewer main being constructed as a part of this project, within Six (6) Months after the property owner receives a written notice from the Village or District that the sewer main is available to serve the Presently-Improved.
14. A property owner of a Presently-Improved Property, as described in above Paragraph 13, shall pay the special assessment on the said Presently-Improved Property in one of the following ways:
- a) Within Sixty (60) Days after the date of the connection of the Presently-Improved Property to the Sewer Main/Sanitary Lateral, pay the entire amount of the special assessment, without interest, to the District/Village.

- b) Pay the special assessment on the Presently-Improved Property in equal annual installments on the tax roll of the said property, plus interest accruing on the said special assessment at the rate of Three and One-Half Percent (3½ %) per annum from the date of connection until paid in full. The number of equal annual installment payments on the tax roll of the property shall be determined by the date on which the Presently-Improved Property is connected to the Sanitary main/Sanitary Service. The first year on the tax roll shall be (i) the tax year 2022, if the said connection is made on or before October 1, 2022, and (ii) if the connection is made after the date of October 1 of a given year (in, or after, 2022), then on the tax year that next follows the year of connection. The last year on the tax roll shall be the tax year 2041. (By way of example, if a connection is made on the date of July 1, 2022, then the payment of the special assessment may be placed on the tax roll of the Presently-Improved Property for the tax years 2022 through 2041, or in 20 equal annual installment payments. If the connection is made on October 30, 2022; however, then there would be an option to pay the special assessment in 19 equal installment payments, in tax years 2023 through 2041.) Essentially, for each year of the 20-year time period that lapses before the connection to the Sanitary main/Sanitary Service is made as described above, there will be a similar reduction in the number of years over which the special assessment may then be paid in equal annual installment payments on the tax roll of the Presently-Improved Property.
 - c) If the special assessment on the Presently-Improved Property is placed on the tax roll of the property as described in above Subparagraph (b), the property owner may at any time pay the entire then-remaining balance of the special assessment, plus accrued interest, to the District/Village.
15. If the property owner of a Presently-Improved Property (as described above in Paragraph 13) does not actually connect to the Sanitary main/Sanitary Service during the 20-year period described above, then the option to pay the special assessment as described in above Paragraph 13 and Subparagraph 14(b) shall automatically become null and void. The provisions contained in above Subparagraph 14(a) shall then exclusively control. The 20-year payment plan, described in above Subparagraph 14(b), for a benefitted vacant parcel which experiences a Trigger Event, as described in above Paragraph 12, shall commence on the date of the Trigger Event, provided that a Trigger Event occurs on or before October 1, 2041. If the said Trigger Event occurs after the date of October 1, 2041, then the option to pay the special assessment as described in above Paragraph 13 and Subparagraph 14(b) shall automatically become null and void. The provisions contained in above Subparagraph 14(a) shall then exclusively control.
16. With respect to the benefitted properties that are not “Presently-Improved Properties” described above, being parcels #2 and #17 described in attached Exhibit 6, the sanitary sewer special assessments being levied on such other benefitted properties shall be paid as described in above Paragraphs 13-15.
17. In addition to the assessed amount for sanitary sewer main and lateral, each Presently-Improved Property with a single family residence will need to pay connection charges described below, in the amount of \$5,100, in accordance with Section 9-4-5 of the Village of Caledonia Ordinances. A basic charge of \$2,550 will be placed in a separate account and used only for operation and maintenance expenses, depreciation and note or bond redemption. In addition to the basic

connection charge and prior to the issuance of a permit allowing connection to the sanitary sewer system, a unit connection charge shall be paid in the amount of \$2,550 for each residential equivalent unit (REU) attributed to such lot, parcel of land or premises. This charge shall be paid upon the issuance of a building permit by the Village for connection to the sanitary sewer system. Nonresidential buildings shall be assigned REU numbers based upon the water meter or meters servicing such buildings as set forth in the table found in Section 9-4-5. An excerpt of the Village of Caledonia Ordinances is attached as Exhibit 9. If, in the future, these Ordinances are amended or modified, and/or successor Ordinances are enacted, then the terms and provisions of the amended/modified/successor Ordinances shall apply.

18. Special Provisions regarding other possible land divisions.

- A. When and if any other benefitted property owner listed in attached Exhibit 2 does a land division of any nature prior to the levy of the special assessments described in this Report, then the special assessment to be levied on the original benefitted parcel, but now divided in some manner, is being levied in full, jointly and severally, on each of the said separate subdivided parcels of land (that together comprise the original benefitted parcel). Any payment(s) of the special assessment so levied on each of the subdivided parcels shall be a credit to all of the said subdivided parcels.
- B. When and if any other benefitted property owner listed in attached Exhibit 6 does a land division of any nature prior to the levy of the special assessments described in this Report, then the special assessment to be levied on the original benefitted parcel, but now divided in some manner, is being levied in full, jointly and severally, on each of the said separate subdivided parcels of land (that together comprise the original benefitted parcel). Any payment(s) of the special assessment so levied on each of the subdivided parcels shall be a credit to all of the said subdivided parcels.
- C. Notwithstanding any levy against one or multiple parcels of land due to a land division as described above under Paragraph 18, the Village will not recognize as legal any land divisions that are accomplished in violation of the requirements of the Village's Code of Ordinances and applicable Wisconsin Statutes. The Village does not waive any requirements of its ordinances by levying any assessments as provided for in this report. The Village reserves all rights to enforce its ordinances, including, but not limited to, the right to issue citations for an ordinance violation, to withhold the issuance of permits and licenses for the parcel of land, and to seek injunctive relief requiring compliance with the Village's ordinances.

**EXHIBIT 5
DEBACK PHASE III ASSESSMENT SCHEDULE
SANITARY SEWER MAIN EXTENSION PROJECT
VILLAGE OF CALEDONIA
SEPTEMBER 13, 2021**

Parcel No.	Taxkey	Property Owner Name	Physical Address	Mailing Address	City	State	Zip Code	Acreage*	Base Sewer Assessment Amount	Sewer Payment	Existing Building Sewer Lateral	Assessment Reduction	Total Sewer Payment	
1	104-04-22-30-020-000	Four Mile Rd LLC	13623 4 Mile Rd	PO Box 274	Franksville	WI	53126	2.27	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
2	104-04-22-30-015-202	Wispark LLC	Adams Rd	231 West Michigan St P423	Milwaukee	WI	53203	58.40	\$15,633.14	\$239,508.49	\$5,893.33	(\$8,644.56)	\$252,390.40	
3	104-04-22-30-015-201	Central Storage & Warehouse Company	4 Mile Rd	231 West Michigan St P423	Milwaukee	WI	53203	8.11	\$15,633.14		\$5,893.33	(\$8,644.56)	\$12,881.91	
4	104-04-22-19-073-000	Jpeter Group Inc	12604 4 Mile Rd					0.46	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
5	104-04-22-19-072-000	Shirley J Lochowitz	12616 4 Mile Rd					1.04	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
6	104-04-22-19-074-000	Mark & Debra Hammond	12628 4 Mile Rd					1.00	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
7	104-04-22-19-075-000	Thomas E Michels	12708 4 Mile Rd					1.00	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
8	104-04-22-19-071-000	Darlene Daines	13010 4 Mile Rd					31.06	\$10,440.30	\$98,384.31	\$8,150.00	(\$8,644.56)	\$108,330.05	
9	104-04-22-19-068-000	Jpeter Group Inc	13046 4 Mile Rd	2426 East College Ave	Cudahy	WI	53110	8.33	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
10	104-04-22-19-069-000	Roman V & Louise Kerkman	13108 4 Mile Rd					2.00	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
11	104-04-22-19-067-000	Mark G Gracyalny	13140 4 Mile Rd					22.88	\$10,440.30	\$56,160.61	\$8,150.00	(\$8,644.56)	\$66,106.35	
12	104-04-22-19-063-020	Shawn Utphall & Tracy Johanneck	13332 4 Mile Rd					2.01	\$10,440.30		\$16,300.00	(\$8,644.56)	\$18,095.74	
13	104-04-22-19-063-010	Janet & Felipe I Avendano	13410 4 Mile Rd					2.90	\$10,440.30	\$0.00	\$8,150.00	(\$8,644.56)	\$9,945.74	
14	104-04-22-19-066-000	DEMF Transition Trust 11/13/13	13414 4 Mile Rd					1.02	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
15	104-04-22-19-065-000	Michele Miller, Miller 2014 Joint Rev Trust Dated 02/28/2014	13420 4 Mile Rd					1.02	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
16	104-04-22-19-064-000	William J & Judith Hurtienne	13510 4 Mile Rd					0.50	\$10,440.30		\$8,150.00	(\$8,644.56)	\$9,945.74	
17	104-04-22-19-063-030	Michael Dwyer Holding LLC	4 Mile Rd	2410 South Stoughton Rd	Madison	WI	53716	15.14	\$15,633.14	\$16,208.12	\$5,893.33	(\$8,644.56)	\$29,090.03	
								Average:	9.36		\$82,052.31			\$35,076.33
								Total:	159.14	\$193,063.62	\$410,261.53	\$139,929.99	(\$146,957.50)	\$596,297.64

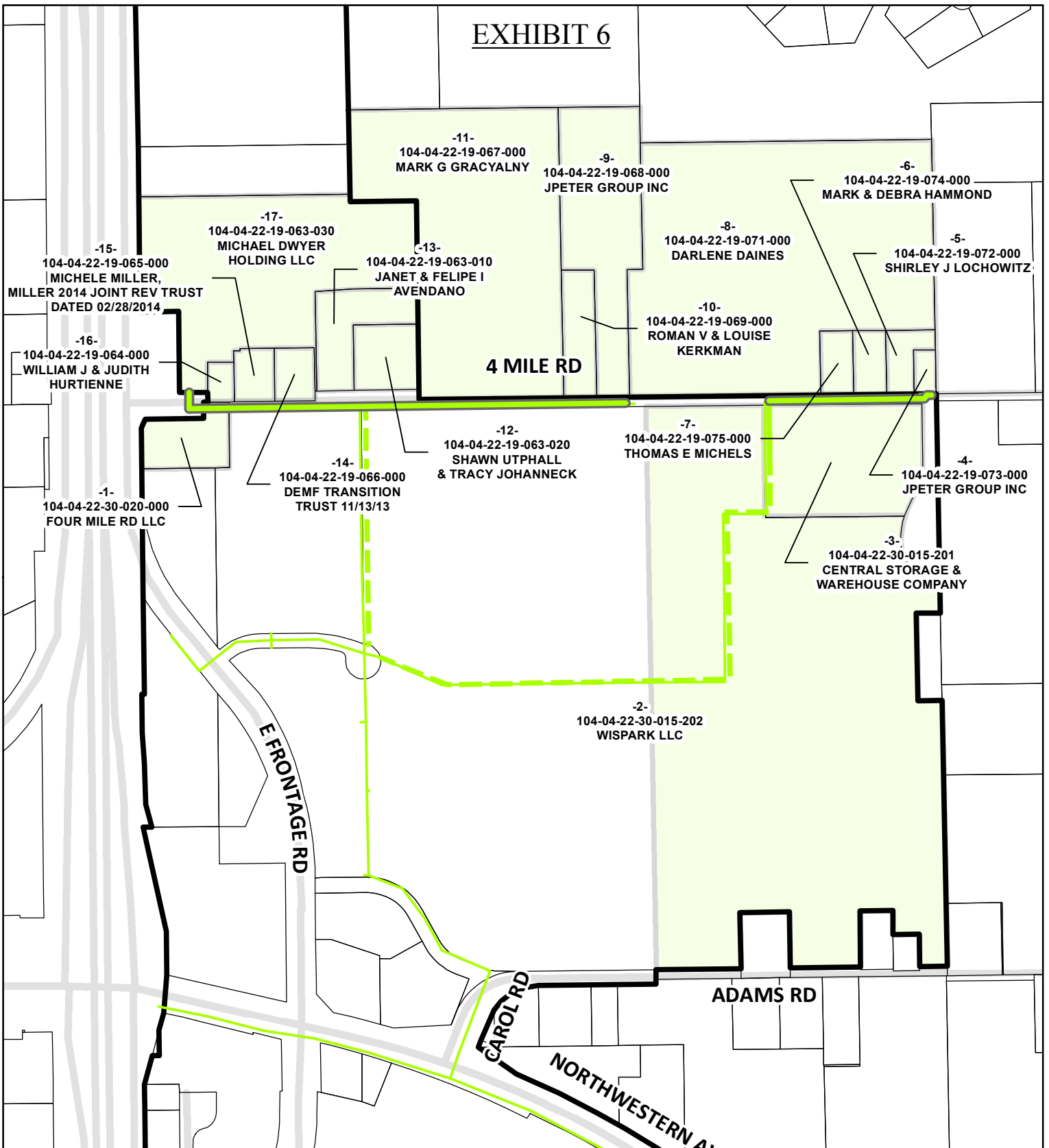
Notes: Property data gathered from the Racine County GIS Map Site or certified survey map, except where indicated.

* Acreage excludes mapped 2010 WDNR wetland data.

Property has 2 homes that need services, so the lateral costs have been doubled.

- Total sewer cost for DeBack Phase III based estimate of \$4,042,885 developed from recent bid information.
- Sewer main assessment payment for non-commercial properties of \$10,440.30 based on \$65/front foot multiplied by a minimum lot frontage of 150' for A-2 zoning, the zoning of the majority of the benefitted properties, adjusted to June 2018 values.
- Sewer main assessment payment for commercial properties of \$15,633.14 based on \$97.33/front foot multiplied by a minimum lot frontage of 150' for A-2 zoning, the zoning of the majority of the benefitted properties, adjusted to June 2018 values.
- Sewer payment based on assessable amount of \$410,261.53 divided by acreage, after applying minimum sewer main assessment of \$10,440.30 for each non-commercial property and \$15,633.14 for each commercial property.
- Costs for sewer lateral services are in addition to the total assessment cost for each property.
- Sewer lateral costs for non-commercial property based on total lineal footage of 938 LF at a cost of \$114,100/14 properties = \$8,150.00 for each property.
- Sewer lateral costs for commercial property based on total lineal footage of 136 LF at a cost of \$17,680/3 properties = \$5,893.33 for each property.
- Sewer assessment reduced by \$8,644.56 per property per Village Board on July 19, 2021

EXHIBIT 6



Village of Caledonia

TID 4: Phase 3 Utility Improvements Benefited Properties 4 Mile Road Water

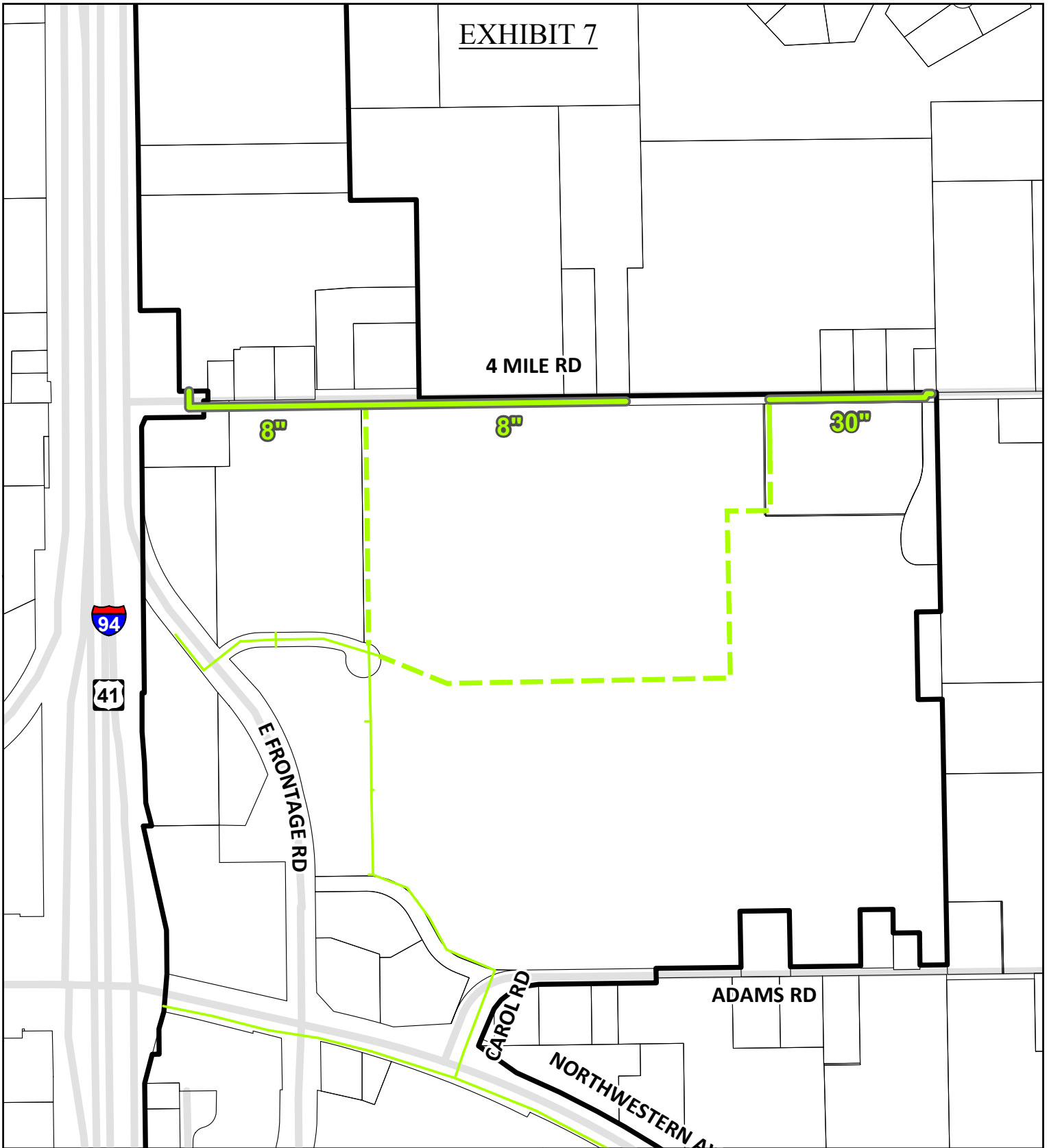
Q:\Caledonia Utility District\18C030.04 - TID #4 Phase 3 Utility Improvements\GIS\mxd\18C030.04 4 Mile Rd Improvements Benefited Properties 06142018.mxd

February 2021



- Proposed Sanitary Sewer Main - Assessable
- Proposed Sanitary Sewer Main - Not Assessable
- Existing Sanitary Sewer Main
- TID 4 Boundary
- Parcels
- Roads
- Benefited Property

EXHIBIT 7



Village of Caledonia

**TID 4: Phase 3 Utility Improvements
Proposed Assessable Improvements
4 Mile Road Sanitary Sewer**

Q:\Caledonia Utility District\18C030.04 - TID #4 Phase 3 Utility Improvements\GIS\mxd\18C030.04 4 Mile Rd Improvements Assessable Improvements 06142018.mxd

May 2019



- Proposed Sanitary Sewer Main - Assessable
- Proposed Sanitary Sewer Main - Not Assessable
- Existing Sanitary Sewer Main

- TID 4 Boundary
- Parcels
- Roads

CONTENT OF THE PREVIOUSLY SENT
INSTALLMENT ASSESSMENT NOTICE
FOR THE DEBACK PHASE III WATER MAIN/SEWER PROJECT

The Water Main and Sewer Project has been undertaken and the special assessments are now being levied on the benefitted Properties. An Installment Assessment Notice, as required by Section 66.0715 of the Wisconsin Statutes, has been timely sent to each benefitted Property Owner. This notice included, in part, the original the provisions contained in Paragraphs 11 through 16 for water main and Paragraphs 8 through 13 for sewer main of the “Summary Notes” portion of this Report, but which are now amended as outlined in this Amended Report.

**EXHIBIT 8
DEBACK PHASE III ASSESSMENT SCHEDULE
WATER AND SANITARY SEWER MAIN EXTENSION PROJECT
VILLAGE OF CALEDONIA
SEPTEMBER 13, 2021**

Parcel No.	Taxkey	Property Owner Name	Physical Address	Mailing Address	City	State	Zip Code	Acreage*	Base Water Assessment Amount	Water Payment (Based on Acreage)	Base Sewer Assessment Amount	Sewer Payment (Based on Acreage)	Existing Building Water Service	Existing Building Sewer Lateral	Assessment Reduction	Total Payment	
1	104-04-22-30-020-000	Four Mile Rd LLC	13623 4 Mile Rd	PO Box 274	Franksville	WI	53126	2.27	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
2	104-04-22-30-015-202	Wispark LLC	Adams Rd	231 West Michigan St P423	Milwaukee	WI	53203	58.40	\$14,147.39	\$63,985.88	\$15,633.14	\$239,508.49	\$8,898.33	\$5,893.33	(\$14,705.88)	\$333,360.68	
3	104-04-22-30-015-201	Central Storage & Warehouse Company	4 Mile Rd	231 West Michigan St P423	Milwaukee	WI	53203	8.11	\$14,147.39		\$15,633.14		\$8,898.33	\$5,893.33	(\$14,705.88)	\$29,866.31	
4	104-04-22-19-073-000	Jpeter Group Inc	12604 4 Mile Rd					0.46	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
5	104-04-22-19-072-000	Shirley J Lochowitz	12616 4 Mile Rd					1.04	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
6	104-04-22-19-074-000	Mark & Debra Hammond	12628 4 Mile Rd					1.00	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
7	104-04-22-19-075-000	Thomas E Michels	12708 4 Mile Rd					1.00	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
8	104-04-22-19-071-000	Darlene Daines	13010 4 Mile Rd					31.06	\$9,431.59	\$26,283.86	\$10,440.30	\$98,384.31	\$3,603.29	\$8,150.00	(\$14,705.88)	\$141,587.47	
9	104-04-22-19-068-000	Jpeter Group Inc	13046 4 Mile Rd	2426 East College Ave	Cudahy	WI	53110	8.33	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
10	104-04-22-19-069-000	Roman V & Louise Kerkman	13108 4 Mile Rd					2.00	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
11	104-04-22-19-067-000	Mark G Gracyalny	13140 4 Mile Rd					22.88	\$9,431.59	\$15,003.59	\$10,440.30	\$56,160.61	\$3,603.29	\$8,150.00	(\$14,705.88)	\$88,083.50	
12	104-04-22-19-063-020	Shawn Uthphall & Tracy Johanneck	13332 4 Mile Rd					2.01	\$9,431.59		\$10,440.30		\$7,206.58	\$16,300.00	(\$14,705.88)	\$28,672.59	
13	104-04-22-19-063-010	Janet & Felipe I Avendano	13410 4 Mile Rd					2.90	\$9,431.59	\$0.00	\$10,440.30	\$0.00	\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
14	104-04-22-19-066-000	DEMF Transition Trust 11/13/13	13414 4 Mile Rd					1.02	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
15	104-04-22-19-065-000	Michele Miller, Miller 2014 Joint Rev Trust Dated 02/28/2014	13420 4 Mile Rd					1.02	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
16	104-04-22-19-064-000	William J & Judith Hurtienne	13510 4 Mile Rd					0.50	\$9,431.59		\$10,440.30		\$3,603.29	\$8,150.00	(\$14,705.88)	\$16,919.30	
17	104-04-22-19-063-030	Michael Dwyer Holding LLC	4 Mile Rd	2410 South Stoughton Rd	Madison	WI	53716	15.14	\$14,147.39	\$4,330.08	\$15,633.14	\$16,208.12	\$8,898.33	\$5,893.33	(\$14,705.88)	\$50,404.51	
								Average:	9.36			\$21,920.68		\$82,052.31		\$50,475.72	
								Total:	159.14	\$174,484.43	\$109,603.41	\$193,063.62	\$410,261.53	\$80,744.34	\$139,929.99	(\$250,000.00)	\$858,087.32

Notes: Property data gathered from the Racine County GIS Map Site or certified survey map, except where indicated.

* Acreage excludes mapped 2010 WDNR wetland data.

Property has 2 homes that need services, so the lateral costs have been doubled.

1. Watermain assessment payment for non-commercial properties of \$9,431.59 is based on CTH K assessments and 8" equivalent main adjusted to June 2018 values.
2. Watermain assessment payment for commercial properties of \$14,147.39 is based on CTH K assessment amount upsized for a 12" equivalent main adjusted to June 2018 values.
3. Total water main cost for DeBack Phase III based on estimate of \$1,338,563 developed from recent bid information.
4. Water payment based on assessable amount of \$109,603.41 divided by acreage, after applying water main assessment of \$9,431.59 for each non-commercial property and \$14,147.39 for each commercial property.
5. Total sewer cost for DeBack Phase III based estimate of \$4,042,885 developed from recent bid information.
6. Sewer main assessment payment for non-commercial properties of \$10,440.30 based on \$65/front foot multiplied by a minimum lot frontage of 150' for A-2 zoning, the zoning of the majority of the benefitted properties, adjusted to June 2018 values.
7. Sewer main assessment payment for commercial properties of \$15,633.14 based on \$97.33/front foot multiplied by a minimum lot frontage of 150' for A-2 zoning, the zoning of the majority of the benefitted properties, adjusted to June 2018 values.
8. Sewer payment based on assessable amount of \$410,261.53 divided by acreage, after applying minimum sewer main assessment of \$10,440.30 for each non-commercial property and \$15,633.14 for each commercial property.
9. Costs for sanitary laterals and water services are in addition to the total assessment cost for each property.
10. Water service costs for non-commercial property based on total lineal footage of 390 LF at a cost of \$50,446/14 properties = \$3,603.29 for each property.
11. Water service costs for commercial property based on total lineal footage of 225 LF at a cost of \$26,695/3 properties = \$8,898.33 for each property.
12. Sewer lateral costs for non-commercial property based on total lineal footage of 938 LF at a cost of \$114,100/14 properties = \$8,150.00 for each property.
13. Sewer lateral costs for commercial property based on total lineal footage of 136 LF at a cost of \$17,680/3 properties = \$5,893.33 for each property.
14. The total cost for the DeBack Phase III extension project is estimated to be \$5,888,252.00 with an assessable amount of \$858,087.32.
15. Assessment reduced by \$14,705.88 per property per Village Board on July 19, 2021

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SEC. 9-4-5 SEWERAGE CONNECTION CHARGES.

- (a) **Basic Charge.** Prior to the issuance of a permit allowing connection to the sanitary sewerage system of the District, there shall be paid to the District and collected by the Village Treasurer on each lot, parcel of land or premises to be connected, a unit connection charge in the amount of **\$2,550**. The charge, to be paid upon the issuance of a building permit by the Village, shall be placed in a separate account and shall be used only for payment of operation and maintenance expenses, depreciation, and note or bond redemption.
- (b) **REU Charge.** . In addition to the basic connection charge provided in (a) above, and prior to the issuance of a permit allowing connection to the sanitary sewerage system of the District, there shall be paid to the District and collected by the Village Treasurer on each lot, parcel of land or premises to be connected to the Districts' system a unit connection charge, in the amount of **\$2,550**, for each residential equivalent unit (REU) attributed to such lot, parcel of land or premises. The REU charge shall be paid upon the issuance of a building permit by the Village.
- (1) For purposes of this subsection, each single-family residential housing unit shall constitute one REU, whether located within a one-family, multi-family, condominium, rental or owner-occupied unit. Cooperative residential buildings, institutional and nonresidential buildings shall be assigned REU numbers based upon the size of the water meter or meters servicing such buildings as set forth in the following table:

VILLAGE OF CALEDONIA/CALEDONIA SEWER UTILITY DISTRICT REU RATIO

Meter Size (inches)	Meter Type	Flow (gpm)	REU Ratio
3/4 or less	Displacement	15	1.0
1	Displacement	25	2.5
1-1/2	Displacement	50	5.0
2	Displacement	80	8.0
2	Compound	80	8.0
2	Turbine - Cl. 1	80	8.0
2	Turbine - Cl.2	100	10.0
3	Compound	160	16.0
3	Turbine - Cl. 1	175	17.5
3	Turbine - Cl.2	240	24.0
4	Compound	250	25.0
4	Turbine - Cl. 1	300	30.0
4	Turbine - Cl. 2	420	42.0
6	Compound	500	50.0

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6	Turbine - Cl. 1	625	62.5
6	Turbine - Cl. 2	920	92.0
8	Compound	800	80.0
8	Turbine - Cl. 1	900	90.0
8	Turbine - Cl. 2	1,600	160.0
10	Compound	1,150	115.0
10	Turbine - Cl. 1	1,450	145.0
10	Turbine - Cl. 2	2,500	250.0
12	Turbine - Cl. 1	2,150	215.0
12	Turbine - Cl. 2	3,300	330.0

- (1) The connection charge collected under this subsection shall be placed in a separate account and shall be used for the payment of the costs of lift stations, force mains, detention facilities, interceptor mains and the expansion of Racine Wastewater facilities.
- (c) **Exemption from Charge.** No basic charge or REU charge shall be collected by the Village Treasurer if the property to be serviced has been previously assessed for such connection charges.
- (d) **Refund of Sewer Connection Charges.** Sewer connection charges shall be refunded to the permittee upon the lapse of a building permit, within the meaning of Section 15-1-7.

SEC. 9-4-6 CONNECTIONS TO SEWER MAINS.

(a) **Definitions.**

- (1) **Accessory Use or Structure** shall mean a use or detached structure subordinate to the principal use of a structure, land or water and located on the same lot or parcel, serving a purpose customarily incidental to the principal structure.
- (2) **Building** shall mean a structure having a roof supported by columns or walls used or intended to be used for the shelter or enclosure of persons, animals, equipment, machinery, or materials.
- (3) **Failure** shall mean a failing private sewage system as that term is defined in Sec. 145.245(4), Wis. Stats., as amended from time-to-time.
- (4) **Land Split** shall have the same meaning as defined in Sec. 14-1-2(c) of this Code of Ordinances.
- (5) **Subdivision** shall have the same meaning as defined in Sec. 14-3-2(x) of this Code of Ordinances.

(b) **Compulsory Connection.**

- (1) **Residential or Agricultural Use.** The owner of a Building in a residential or agricultural zoning district shall have all plumbing connected to a sewer main at the expense of the Building's owner if any part of the Building is within 500 feet of a sewer main or the right-of-way in which a sewer main is located. Mandatory

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connection is required, regardless of Building distance, for Subdivisions and Land Splits pursuant to Sec. 14-3-4(c)(6) of the Code of Ordinances. Any Building upon a parcel for which a conditional use permit is granted shall comply with the connection requirements of 9-4-7(b)(2) below. This subsection shall not apply to residential parcels in the Ponds of Caledonia Subdivision as originally platted or the Ponds II of Caledonia Subdivision as originally platted, both of which are conservation subdivisions existing prior to the effective date of this ordinance, and Oldfield Settlement Subdivision as originally platted, unless there is a Failure of any parcel's individual Private Onsite Wastewater Treatment System or a Failure of any private Community Onsite Wastewater Treatment System servicing more than one (1) parcel of land. In the event that a Failure occurs, all parcels within such subdivision shall be required to connect to a sewer main pursuant to this Section within eighteen (18) months of a determination of such Failure in accordance with Sec. 145.245(1)(a), as amended from time-to-time, or sooner if any applicable Federal law, Wisconsin Statute, Wisconsin Administrative Code, Racine County ordinance or other local regulation so requires. Notwithstanding the time-period required for connection to a public sewer main, the owner of any parcel served by a system that has failed shall take immediate action to address the Failure and abate any health hazard that may be caused by such Failure.

- (2) **Other Use.** The owner of a Building zoned for any other purpose shall have all plumbing connected to a sewer main at the expense of the Building's owner if any part of the parcel, upon which the Building is located, is within 500 feet of a sewer main or the right-of-way in which a sewer main is located.
- (c) **Time to Connect and Connection Charge.** The connection shall be made within six (6) months from the date the owner or occupant of the property receives written notice from the Village or District that a sewer main is available to serve the property and the applicable connection charge shall be paid to the District and Village in accordance with Section 9-4-5 of the Village's Code of Ordinances.
- (d) **Sewerage Charge.** The initial sewerage charge applicable to the property shall be due when the connection to the sewer main is made, or sixty (60) days after written notice of sewer availability is given to the owner or occupant of the property, whichever comes first, whether or not a building on the premises is inhabited or not. This charge shall be due and payable regardless of whether the connection is made and/or whether the service is utilized once connected. Subsequent charges become due and payable on a quarterly basis.
- (e) **Connection to Manholes Prohibited.** Connections shall be made to the sewer main and not directly to a manhole, unless written permission is granted by the District Manager, and the connection is made as directed.
- (f) **Repair and Maintenance.** The property owner shall be responsible for (1) all repair, replacement and maintenance costs associated with the lateral from the private property line to the building being served, and (2) all costs associated with lateral cleaning and root removal from the sewer main to the building being served. Except for cleaning and root removal costs, the Utility shall be responsible for all repairs, replacement and maintenance costs for that portion of the lateral contained within the public road right-of-way.