



**AGENDA PACKET**  
**VILLAGE OF LAKE ZURICH**  
**Village Board of Trustees Meeting**

**June 16, 2025**  
**07:00 pm**

# VILLAGE OF LAKE ZURICH

## VILLAGE BOARD OF TRUSTEES MEETING

**JUNE 16, 2025**  
**07:00 PM**  
**AGENDA**

**1. CALL TO ORDER**

**2. ROLL CALL**

Mayor Thomas Poynton, Trustee Sujatha Bharadwaj, Trustee Jake Marx, Trustee William Riley, Trustee Marc Spacone, Trustee Roger Sugrue, Trustee Greg Weider.

**3. PLEDGE OF ALLEGIANCE**

**4. PRESIDENT'S REPORT / COMMUNITY UPDATE**

**5. PUBLIC COMMENT**

This is an opportunity for residents to comment briefly on matters included on the agenda and otherwise of interest to the Board of Trustees. Public Comment is limited to 30 minutes total and up to 5 minutes per speaker.

**6. CONSENT AGENDA**

These titles will be read by the Village Clerk and approved by a single Roll Call Vote. Any item may be pulled from the Consent Agenda for discussion by any Village Trustee.

**A. Approval of Minutes from the Village Board Meeting of June 2, 2025**

Attachment: [6a.pdf](#)

**B. Approval of Semi-Monthly Warrant Register Dated June 16, 2025 Totaling \$1,554,084.21**

Attachment: [6b.pdf](#)

**C. Agreement with ESSCOE, LLC for the Police Department CCTV and Access Control System Updates in the Amount Not-to-Exceed \$70,000**

**Summary:** As a result of the relocation of Lake Zurich dispatch center staff to the consolidated dispatch center in Libertyville in the third quarter of this year, the Police Department requires the expansion of its CCTV and access control system. ESSCOE, LLC has been requested to submit a proposal for upgrading the existing system, which was originally installed and maintained by them, to meet the new operational requirements. These systems are highly integrated and technically intricate, and soliciting bids from multiple vendors is not be the most efficient or cost-effective approach for the Village.

Staff recommends awarding a contract to ESSCOS, LLC for the expansion of CCTV and door access control systems in the Police Department in the amount not-to-exceed \$70,000.

Attachment: [6c.pdf](#)

**D. Agreement with Upland Design Ltd. for the Key Parks Master Plan in the Amount Not-to-Exceed \$98,910**

**Summary:** The objective of the Parks Master Plan is to optimize the Village's existing key park properties while strategically planning for the future allocation of resources and potential redevelopment of these parks over the next 5 to 10 years. The FY 2025 Budget currently includes \$100,000 in funding to support the development of the Master Plan.

The Village announced a Request for Proposal on March 3 for the development of a master plan for key parks and received twelve proposals in response. A multi-department review team evaluated the proposals and concluded that Upland Design Ltd.'s submittal offered the park development and renovation expertise that would best match the Village's needs at this time.

Staff recommends awarding an agreement to Upland Design Ltd. to develop a master plans for key parks in the amount not-to-exceed \$98,910.

Attachment: [6d.pdf](#)



## **E. Agreement with Paramedic Billing Services Inc. for Providing Ambulance Billing Services in the Village of Lake Zurich**

**Summary:** The Village is seeking new ambulance billing service since the last agreement with Andres Medical Service was updated in 1997. Many regulatory and compliance changes have occurred involving billing practices for Emergency Medical Service providers. Village staff researched vendors that are well versed in current regulatory standards of ambulance billing and practices that afford the community to receive EMS services that are cost-effective and reliable.

Staff had found a limited number of ambulance service providers available. Paramedic Billing Services stood out as their fee structure remains the same as Andres at 4% of revenues collected, while offering greater administrator support, record keeping, and assistance with federal and state reimbursement submittals.

Staff recommends the approval of an agreement with Paramedic Billing Services Inc as the Villages ambulance billing services provider.

Attachment: [6e.pdf](#)

## **7. NEW BUSINESS- No new items.**

## **8. TRUSTEE REPORTS**

## **9. VILLAGE STAFF REPORTS**

### **A. Lake Michigan Water Project Update**

Representatives from CLCJAWA and CDM Smith will join staff in providing a comprehensive update on the Lake Michigan Water Project.

### **B. Monthly Data Metrics**

Attachment: [CD Monthly Report.pdf](#)

Attachment: [PD Monthly Report.pdf](#)

Attachment: [PR Monthly Report.pdf](#)

Attachment: [FD Monthly Report.pdf](#)

Attachment: [PW Monthly Report.pdf](#)

## **10. ADJOURNMENT**

The next regularly scheduled Village Board meeting is on Monday, July 7, 2025.

UNAPPROVED MINUTES  
VILLAGE OF LAKE ZURICH  
Board of Trustees  
70 East Main Street



Monday, June 2, 2025 7:00 p.m.

1. **CALL TO ORDER:** by Mayor Tom Poynton at 7.00pm
2. **ROLL CALL:** Mayor Thomas Poynton, Trustee Jake Marx, Trustee Marc Spacone, Trustee Roger Sugrue, Trustee Greg Weider. Trustees Sujatha Bharadwaj and Trustee William Riley were absent and excused. Also in attendance: Village Manager Ray Keller, Asst. Village Manager Michael Duebner, Atty. Scott Uhler, Finance Dir. Rita Kruse, Police Chief Steve Husak, Dir. Of Community Development Sarosh Saher, Public Works Dir. Mike Brown.
3. **PLEDGE OF ALLEGIANCE**
4. **PUBLIC COMMENT**  
There were none.
5. **PRESIDENT'S REPORT / COMMUNITY UPDATE**  
Proclamation – Gun Violence Awareness Day was read by Mayor Poynton.
6. **CONSENT AGENDA**
  - A. **Approval of Minutes from the Village Board Meeting of May 19, 2025**
  - B. **Approval of Executive Session Minutes from the Village Board Meeting of April 7, 2025**
  - C. **Approval of Semi-Monthly Warrant Register Dated June 2, 2025 Totaling \$2,161,141.67**
  - D. **Ordinance Granting a Variation for a Front Porch at 17 Lake Street ORD. #2025-06-612**

**Summary:** Mr. Ronald Vindell has filed a zoning application for a variation for a front porch located at 17 Lake Street. The property is located within the Village's R-5 Single-Family Residential District that requires porches be located no less than 25 feet from any front lot line. The proposed plan provides that the porch will be constructed 11 feet from the front lot line which will encroach into the front yard setback by 14 feet and run along the entire length of the front of the home.

At their May 21, 2025 meeting, the Planning and Zoning Commission commended approval of the variation for the front porch setback. Staff recommends approval of the ordinance granting the variation.
  - E. **Ordinance Granting a Variation for an Outside Stairway at 287 Sunrise Lane ORD. #2025-06-613**

Village of Lake Zurich Board of Trustees Regular Meeting. Monday June 2<sup>nd</sup>, 2025. 2

**Summary:** Ms. Jerrett Sita has filed a zoning application for a variation to allow the construction of an outside stairway within the front and side yard setbacks. The home on the property was completed in the early part of 2025 and had met requirements of the zoning code. Upon final inspection of the site, Village staff found work completed without permits including an outside stairway installed within the side yard setback, expansion of the driveway and reconfiguration of the retaining wall into the side yard setback. Staff will assess applicable fines for the work completed without prior permit approval and will inspect for compliance with all other applicable codes and ordinances. The Planning and Zoning Commission meeting on April 16, 2025 recommended approval of the variation request for the outside stairway built, to remain as constructed. Staff recommends approval of the ordinance granting the variation.

**F. Agreement with Chicagoland Paving for the 2025 Patching Program in the Amount Not-to-Exceed \$150,000**

**Summary:** The FY 2025 budget includes \$150,000 in the Non-Home Rule Sales Tax fund for the 2025 Patching Program. To ensure cost-effective street maintenance, the Village participates in a cooperative bid agreement through the Municipal Partnership Initiative (MPI). The MPI Pavement Patching Program was bid on March 24, 2025, yielding six bids. Staff recommends awarding a contract for the 2025 Patching Program to Chicagoland Paving Contractors in the amount not-to-exceed \$150,000.

**G. Agreement with Pipeview America for Extension of the 2025 Sanitary and Storm Sewer Televising Contract in the Amount Not-to-Exceed \$100,000**

**Summary:** The FY 2025 budget includes \$100,000 in the water and sewer fund for televising Village infrastructure. Closed-circuit television inspection is the most cost efficient and effective method to inspect the internal conditions of underground utilities.

The current televising contract was bid in 2023 as a one-year contract, with the option to extend for two additional years. A bid opening on September 20, 2023 yielded five bids. Staff recommends extending the contract for the final year for the 2025 Sewer Televising Inspection project to Pipeview America in the amount not-to-exceed \$100,000.

**H. Agreement with Layne Christensen Company to Repair Well No. 8 in the Amount Not-to-Exceed \$119,675**

**Summary:** During normal operations on April 9, 2025, the motor protection for Well No.8 pump motor tripped indicating a locked rotor condition. The well is currently out of service to determine if the locked rotor is within the submersible pump or the motor.

Layne Christensen Company as the sole provider of parts and service for the pumping assembly of the well has provided a partial Phase 1 cost estimate for inspection and diagnosis of the pumping equipment. A phase 2 cost estimate and updated project totals will be provided after inspection and diagnosis for board approval.

Staff recommends authorizing the phase 1 proposal from Layne Christensen Company to inspect and diagnose the pumping equipment from Well No. 8 in the amount not-to-exceed \$119,675.



Village of Lake Zurich Board of Trustees Regular Meeting. Monday June 2<sup>nd</sup>, 2025. 3

**I. Ordinance Amending Chapters of Title 8 of the Lake Zurich Municipal Code ORD. #2025-06-614**

**Summary:** From time to time, staff review the codes to ensure they are updated, accurate, and serve the needs of the community. Staff have filed an application for amendments to the text of the Lake Zurich Municipal Code to amend sections of Zoning Code Chapter 8-11-1. The proposed amendment changes the maximum allowable height of fences in interior side and rear yards from five feet to six feet, to accommodate fences that are more commonly available commercially and are considered adequate for residential privacy.

The Planning and Zoning Commission held a public hearing on May 21, 2025 and voted unanimously in favor of the proposed amendment. Staff recommend approval of the ordinance enacting the code amendment.

**J. Agreement with Patriot Pavement Maintenance for the 2025 Crack Sealing Program in the Amount Not-to-Exceed \$60,000**

**Summary:** The FY 2025 budget includes \$60,000 in the Motor Fuel Tax fund for preventative street maintenance. The bid opening for the crack sealing program occurred on March 27, 2025 with the Village receiving two bids. Staff recommends awarding a contract for the 2025 Crack Sealing Program to Patriot Paving Maintenance in the amount not-to-exceed \$60,000.

Trustee Spacone asked Public Works Dir. Brown about Agenda Item 6H and the issue of the "sole provider". Dir. Brown stated in the future, after the start of Lake Michigan water supply, the village should be able to have more competitive bidding for wells 8 and 12.

**Recommended Action:** A motion to accept the Consent Agenda as presented was made by Mayor Poynton, seconded by Trustee Marx.

AYES: 4 Trustees Marx, Spacone, Sugrue, Weider.

NAYS: 0

ABSENT: 2 Trustees Bharadwaj, Riley.

MOTION CARRIED.

**7. NEW BUSINESS – None at this time.**

**8. TRUSTEE REPORTS**

There were none.

**9. VILLAGE STAFF REPORTS**

There were none.

**10. EXECUTIVE SESSION called for the purpose of:**

5 ILCS 120 / 2 (c) (21) review of executive session minutes; 5ILCS 120 / 2 (c) (5) Purchase or Lease of Real Estate and 120 / 2 (6) setting price for sale/lease of real estate

A motion was made by Trustee Spacone, seconded by Trustee Marx, for the purpose of: 5 ILCS 120 / 2 (c) (21) review of Executive Session minutes, 5ILCS 120 / 2 (c) (5) Purchase or Lease of Real Estate and 5 ILCS 120 / 2 (6) setting price for sale/lease of real estate.

There will be no further business in Open Session.

AYES: 4 Trustees Marx, Spacone, Sugrue, Weider.

NAYS: 0

ABSENT: 2 Trustees Bharadwaj, Riley.

MOTION CARRIED.

The meeting moved to Executive Session at 7.08pm.

Village of Lake Zurich Board of Trustees Regular Meeting. Monday June 2<sup>nd</sup>, 2025. 4

11. **ADJOURNMENT**

The Open and Executive Sessions adjourned at 7.37pm

Respectfully submitted:

Kathleen Johnson, Village Clerk.

Approved by:

\_\_\_\_\_  
Mayor Thomas M. Poynton

\_\_\_\_\_  
Date.

**VILLAGE OF LAKE ZURICH**

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WARRANT REPORT - 6/16/2025

**\$1,554,084.21**

<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
<b>Fund 101 GENERAL</b>				
Dept 00000				
1	101-00000-15001	PREPAID EXPENDITURES	MAINTENANCE FOR RECTRAC AND WEBTRAC	3,504.21
2	101-00000-21101	ACCOUNTS PAYABLE	REFUND OPERATIONAL PERMIT	50.00
3	101-00000-21101	ACCOUNTS PAYABLE	REF INV 184: BROWN, EVERETT	1,615.50
4	101-00000-21201	OTHER ACCOUNTS PAYABLE	WILDWOOD ESTATES	4,912.50
5	101-00000-21201	OTHER ACCOUNTS PAYABLE	670 S OLD RAND RD DEVELOPMENT	4,710.00
6	101-00000-21201	OTHER ACCOUNTS PAYABLE	MEADOW WOOD EAST	816.50
Total For Dept 00000				<u>15,608.71</u>
Dept 11006 LEGISLATIVE MAYOR & BOARD				
1	101-11006-54302	PUBLIC RELATIONS	GREEN BUSINESS AWARD - ARTISAN STOP	103.72
Total For Dept 11006 LEGISLATIVE MAYOR & BOARD				<u>103.72</u>
Dept 12120 VILLAGE ADMIN HUMAN RESOURCES				
1	101-12120-51655	EMPLOYEE RECOGNITION	EMPLOYEE RECOGNITION LUNCHEON - DEPOSIT	1,355.00
2	101-12120-54303	LEGAL NOTICE/PUBLISHING	PAYROLL ACCOUNTANT JOB POSTING	250.00
3	101-12120-54305	EMPLOYEE EXAMS	EMPLOYEE HEALTH SCREENINGS	1,310.00
Total For Dept 12120 VILLAGE ADMIN HUMAN RESOURCES				<u>2,915.00</u>
Dept 12180 VILLAGE ADMIN ECONOMIC DEVELOPMENT				
1	101-12180-54308	TAX REBATES	TAX REBATE - FEBRUARY 2025	13,177.35
2	101-12180-54308	TAX REBATES	TAX REBATE - FEBRUARY 2025	4,115.81
3	101-12180-54308	TAX REBATES	TAX REBATE - FEBRUARY 2025	12,231.62
Total For Dept 12180 VILLAGE ADMIN ECONOMIC DEVELOPMENT				<u>29,524.78</u>
Dept 13001 FINANCE ADMINISTRATION				
1	101-13001-51652	TRAINING AND MEETINGS	ANNUAL CONFERENCE - KRUSE	575.00
2	101-13001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	62.32

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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
3	101-13001-51654	MEMBERSHIPS & SUBSCRIP	NEW MEMBERSHIP FEES 2025	31.25
4	101-13001-51654	MEMBERSHIPS & SUBSCRIP	AICPA MEMBERSHIP	355.00
5	101-13001-51654	MEMBERSHIPS & SUBSCRIP	ANNUAL MEMBERSHIP DUES	190.00
6	101-13001-53208	OFFICE SUPPLIES	SIGN HOLDER	25.64
		Total For Dept 13001 FINANCE ADMINISTRATION		1,239.21
Dept 17001 TECHNOLOGY ADMINISTRATION				
1	101-17001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	77.90
2	101-17001-52111	OTHER PROFESSIONAL SVCS	CREATIVE CLOUD - MAY	387.91
3	101-17001-52111	OTHER PROFESSIONAL SVCS	AWS CLOUD SVCS - MAY	15.66
4	101-17001-52111	OTHER PROFESSIONAL SVCS	MS CLOUD SERVICES - MAY	136.58
5	101-17001-52111	OTHER PROFESSIONAL SVCS	DOCUWARE SUPPORT - JUN	435.01
6	101-17001-52118	SOFTWARE MAINTENANCE	MAINTENANCE FOR RECTRAC AND WEBTRAC	3,504.22
7	101-17001-53203	TELEPHONE & DATA SVCS	INTERNET - 133 N OLD RAND	151.90
8	101-17001-53203	TELEPHONE & DATA SVCS	COMBINED INTERNET - MAY/JUN 2025	8,406.68
9	101-17001-53203	TELEPHONE & DATA SVCS	BARN ELEVATOR PHONE	73.84
10	101-17001-53203	TELEPHONE & DATA SVCS	ANALOG LINES 2025 - JUN	1,334.20
11	101-17001-53407	EQUIP MAINT PART&SUPPLIE	SURGE PROTECTORS, PATCH PANEL	49.87
12	101-17001-56601	CAPITAL LEASE	FIRE & PD - COPIER LEASE	164.73
		Total For Dept 17001 TECHNOLOGY ADMINISTRATION		14,738.50
Dept 24001 POLICE ADMINISTRATION				
1	101-24001-52111	OTHER PROFESSIONAL SVCS	RED LIGHT CAMERA FEE	2,250.00
2	101-24001-52118	SOFTWARE MAINTENANCE	ECITATION PRINTERS	1,535.94
3	101-24001-52118	SOFTWARE MAINTENANCE	POWER DMS ANNUAL SUBSCRIPTION	7,642.38
4	101-24001-53203	TELEPHONE & DATA SVCS	CABLE - PD	65.41
5	101-24001-53209	UNIFORMS	SHIRT, BADGE - SMITH	59.72
6	101-24001-53209	UNIFORMS	SHIRTS - BIONDO	38.08
7	101-24001-53209	UNIFORMS	SOCKS - BIONDO	22.18

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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
8	101-24001-53209	UNIFORMS	SHIRTS - SMITH	56.28
9	101-24001-53209	UNIFORMS	SHIRT, BADGE - BIONDO	60.59
10	101-24001-53401	CUSTODIAL SUPPLIES	PAPER TOWELS, GARBAGE BAGS	439.91
Total For Dept 24001 POLICE ADMINISTRATION				12,170.49
Dept 24210 POLICE OPERATIONS				
1	101-24210-51652	TRAINING AND MEETINGS	COURTSMART ANNUAL SUBSCRIPTION	1,700.00
2	101-24210-52204	OTHER LEGAL	PROSECUTORIAL SERVICES - MAY	6,666.67
3	101-24210-52204	OTHER LEGAL	ADJUDICATION SERVICES - MAY	150.00
4	101-24210-52703	MAINT-VEHICLES	POLICE BICYCLE REPAIRS	217.74
5	101-24210-53209	UNIFORMS	MARINE UNIT HATS	112.00
6	101-24210-53209	UNIFORMS	PANTS - HEER	52.56
7	101-24210-53209	UNIFORMS	SOCKS, EAR TOIP, SHOES - HEER	156.65
Total For Dept 24210 POLICE OPERATIONS				9,055.62
Dept 24230 POLICE CRIME PREVENTION				
1	101-24230-52111	OTHER PROFESSIONAL SVCS	INVESTIGATIVE SEARCH ENGINE	96.40
2	101-24230-52111	OTHER PROFESSIONAL SVCS	CREDIT CHECKS	295.29
3	101-24230-52111	OTHER PROFESSIONAL SVCS	INVESTIGATIVE SEARCH ENGINE	252.20
Total For Dept 24230 POLICE CRIME PREVENTION				643.89
Dept 24240 POLICE INTERGOVERNMENTAL				
1	101-24240-54305	EMPLOYEE EXAMS	NIPAS PHYSICAL - KINGERY	653.00
Total For Dept 24240 POLICE INTERGOVERNMENTAL				653.00
Dept 25001 FIRE ADMINISTRATION				
1	101-25001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	264.86
2	101-25001-53203	TELEPHONE & DATA SVCS	COMBINED INTERNET - MAY/JUN 2025	4,203.35
3	101-25001-53203	TELEPHONE & DATA SVCS	ANALOG LINES 2025 - JUN	202.67



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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
4	101-25001-53204	MOBILE VOICE & DATA	ICLOUD 50BG STORAGE - JUN	0.99
5	101-25001-53204	MOBILE VOICE & DATA	CELL PHONES - FIRE	35.53
6	101-25001-53206	POSTAGE & SHIPPING	SHIPPING - UAS	13.39
7	101-25001-53206	POSTAGE & SHIPPING	SHIPPING	17.96
8	101-25001-53209	UNIFORMS	SHIRTS, PANTS, BELT, JACKET - PILGARD	323.00
9	101-25001-53209	UNIFORMS	SHIRT - WIECEK	57.50
10	101-25001-53209	UNIFORMS	RAIN COAT - YEE	114.00
11	101-25001-53209	UNIFORMS	RAIN COAT - JOHNSON	114.00
12	101-25001-53209	UNIFORMS	SHIRTS - HEDQUIST	72.00
13	101-25001-53209	UNIFORMS	PANTS - PILGARD	79.00
14	101-25001-53209	UNIFORMS	JACKET, SHORTS, CAP, SHIRTS, RAIN COAT - MUNOZ	437.00
15	101-25001-53211	OTHER SUPPLIES	TOWELS	38.99
16	101-25001-53211	OTHER SUPPLIES	TOWELS, TISSUE, DETERGENT	163.12
17	101-25001-53211	OTHER SUPPLIES	CLEANERS, TISSUE	86.96
18	101-25001-53211	OTHER SUPPLIES	TOWELS, CLEANERS, DETERGENT	123.13
19	101-25001-53211	OTHER SUPPLIES	SOAP	220.11
20	101-25001-54305	EMPLOYEE EXAMS	POLYGRAPH EXAM - KRAKAU	210.00
21	101-25001-54305	EMPLOYEE EXAMS	PSYCHOLOGICAL ASSESSMENT - BOLDT	700.00
22	101-25001-54305	EMPLOYEE EXAMS	PSYCHOLOGICAL ASSESSMENT - POSADAS	700.00
23	101-25001-56601	CAPITAL LEASE	FIRE & PD - COPIER LEASE	164.74
		Total For Dept 25001 FIRE ADMINISTRATION		8,342.30
		Dept 25310 FIRE EMERGENCY MANAGEMENT		
1	101-25310-52704	MAINT-EQUIPMENT	OUTDOOR WARNING SIREN MAINTENACE - 6/1/25 - 5/31/26	4,290.00
		Total For Dept 25310 FIRE EMERGENCY MANAGEMENT		4,290.00
		Dept 25320 FIRE FIRE SUPPRESSION		
1	101-25320-51652	TRAINING AND MEETINGS	FIREGROUND CO OFFICER SCHOOL - JOHNSON	2,075.00
2	101-25320-51652	TRAINING AND MEETINGS	ROPE OPERATIONS - MUNOZ	900.00

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3	101-25320-52704	MAINT-EQUIPMENT	GEAR CLEANING	19,950.00
4	101-25320-53209	UNIFORMS	PASSPORT TAGS	44.07
5	101-25320-53209	UNIFORMS	FIRE BOOTS	349.99
6	101-25320-53211	OTHER SUPPLIES	REHAB SUPPLIES	77.94
		Total For Dept 25320 FIRE FIRE SUPPRESSION		23,397.00
		Dept 25330 FIRE EMS		
1	101-25330-51652	TRAINING AND MEETINGS	IN-STATION CE FEES 4TH QTR	3,885.00
2	101-25330-53211	OTHER SUPPLIES	OXYGEN RENTAL	138.19
		Total For Dept 25330 FIRE EMS		4,023.19
		Dept 25340 FIRE SPECIAL RESCUE		
1	101-25340-52704	MAINT-EQUIPMENT	GAS MONITOR CALIBRATION	531.00
2	101-25340-55254	MACHINERY & EQUIPMENT	DIVE COMPUTERS	4,521.75
		Total For Dept 25340 FIRE SPECIAL RESCUE		5,052.75
		Dept 28001 COMMUNITY DEVELOPMENT ADMINISTRATION		
1	101-28001-52111	OTHER PROFESSIONAL SVCS	APRIL 2025 BUILDING SERVICES	5,520.93
2	101-28001-52113	ENGR/ARCHITECTURAL	1178 SYCAMORE	952.50
3	101-28001-52113	ENGR/ARCHITECTURAL	JANKE SUBDIVISION	205.00
4	101-28001-52113	ENGR/ARCHITECTURAL	PAULUS PARK IMPROVEMENTS	1,400.00
5	101-28001-52113	ENGR/ARCHITECTURAL	255 QUENTIN RD	1,360.00
6	101-28001-52113	ENGR/ARCHITECTURAL	BUILDING PERMIT REVIEWS - 2025	9,370.00
7	101-28001-52113	ENGR/ARCHITECTURAL	1110 HONEY LAKE RD	940.00
8	101-28001-52113	ENGR/ARCHITECTURAL	455 S RAND RD	747.50
9	101-28001-52113	ENGR/ARCHITECTURAL	287 SUNRISE LN	205.00
10	101-28001-52113	ENGR/ARCHITECTURAL	442 S RAND RD	682.50
11	101-28001-52113	ENGR/ARCHITECTURAL	865 TELSER	375.00
12	101-28001-52113	ENGR/ARCHITECTURAL	41 LAKEVIEW	227.50

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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
13	101-28001-52113	ENGR/ARCHITECTURAL	148 OAK	687.50
14	101-28001-52113	ENGR/ARCHITECTURAL	880 S RAND RD	1,552.50
15	101-28001-52113	ENGR/ARCHITECTURAL	1323 CONRAD	227.50
16	101-28001-52113	ENGR/ARCHITECTURAL	26 BEECH	195.00
17	101-28001-52113	ENGR/ARCHITECTURAL	330 E MAIN ST	2,575.00
18	101-28001-52113	ENGR/ARCHITECTURAL	WILDWOOD ESTATES	8,535.00
Total For Dept 28001 COMMUNITY DEVELOPMENT ADMINISTRATION				35,758.43
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	101-36001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	101.27
2	101-36001-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 06/05	32.55
3	101-36001-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 05/29	32.55
4	101-36001-52113	ENGR/ARCHITECTURAL	ELECTRICAL REVIEW MAIN STREET	3,000.00
5	101-36001-52603	LAKE/WATER QUALITY MGMT	2025 NATURAL AREA MAINT LIONS CT	3,850.00
6	101-36001-52605	MOSQUITO ABATEMENT	CATCH BASIN TREATMENTS	8,000.00
7	101-36001-52605	MOSQUITO ABATEMENT	MOSQUITO CONTROL 2025	11,972.00
8	101-36001-52701	MAINT-BLDGS & GROUNDS	FIRE STA #1 PEST CONTROL - MAY	83.00
9	101-36001-52701	MAINT-BLDGS & GROUNDS	UNIFORMS/MATS 06/05	66.63
10	101-36001-52701	MAINT-BLDGS & GROUNDS	UNIFORMS/MATS 05/29	104.62
11	101-36001-52701	MAINT-BLDGS & GROUNDS	505 PLANNING ALARMS	567.60
12	101-36001-52701	MAINT-BLDGS & GROUNDS	FD CHECK FIRE CHECK VALVES	1,170.00
13	101-36001-52701	MAINT-BLDGS & GROUNDS	USED OIL RECOVERY FEE	126.25
14	101-36001-52701	MAINT-BLDGS & GROUNDS	PW PEST CONTROL - MAY	49.00
15	101-36001-52701	MAINT-BLDGS & GROUNDS	PD PEST CONTROL - MAY	93.00
16	101-36001-52702	MAINT-LAWN & LANDSCAPING	2025 MULCH CONTRACT	6,662.92
17	101-36001-52702	MAINT-LAWN & LANDSCAPING	2025 MOWING CONTRACT	5,963.05
18	101-36001-53201	ELECTRICITY	1043 PARTRIDGE LN	61.87
19	101-36001-53204	MOBILE VOICE & DATA	PW TRUCK DATA PLAN	360.00
20	101-36001-53208	OFFICE SUPPLIES	ENVELOPES, PAPER, MARKERS	404.47

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21	101-36001-53209	UNIFORMS	PPE BOOTS - MURPHY	213.23
22	101-36001-53209	UNIFORMS	PPE BOOTS - SCHULER	224.95
23	101-36001-53209	UNIFORMS	PPE BOOTS - SCHULER	215.90
24	101-36001-53211	OTHER SUPPLIES	SIDEBOARDS	211.07
25	101-36001-53401	CUSTODIAL SUPPLIES	WIPES	12.84
26	101-36001-53403	LANDSCAPING SUPPLIES	LANDSCAPE SUPPLIES	538.90
27	101-36001-53403	LANDSCAPING SUPPLIES	WATERING BAGS	609.69
28	101-36001-53403	LANDSCAPING SUPPLIES	WATERING HOSE	96.50
29	101-36001-53404	RIGHT OF WAY SUPPLIES	PUMP HOSE	1,273.24
30	101-36001-53404	RIGHT OF WAY SUPPLIES	MANHOLE	274.00
31	101-36001-53405	BLDG & GROUNDS SUPPLIES	SPRINKLER FITTINGS	22.37
32	101-36001-53405	BLDG & GROUNDS SUPPLIES	ELECTRIC SUPPLIES VH	105.69
33	101-36001-53405	BLDG & GROUNDS SUPPLIES	BRACE	13.87
34	101-36001-53405	BLDG & GROUNDS SUPPLIES	GOO GONE AND PUTTY KNIFE	8.31
35	101-36001-53405	BLDG & GROUNDS SUPPLIES	KEYS	25.42
Total For Dept 36001 PUBLIC WORKS ADMINISTRATION				46,546.76
Dept 36420 PUBLIC WORKS PARK MAINTENANCE				
1	101-36420-52701	MAINT-BLDGS & GROUNDS	UNIFORMS/MATS 05/29	122.66
2	101-36420-52702	MAINT-LAWN & LANDSCAPING	2025 MULCH CONTRACT	21,550.43
3	101-36420-52702	MAINT-LAWN & LANDSCAPING	2025 MOWING CONTRACT	19,286.77
4	101-36420-53201	ELECTRICITY	125 N OLD RAND RD	7,872.07
5	101-36420-53201	ELECTRICITY	200 S RAND RD	255.08
6	101-36420-53201	ELECTRICITY	1432 CONRAD LN	57.55
7	101-36420-53201	ELECTRICITY	972 MARCH ST	26.50
8	101-36420-53210	SMALL TOOLS & EQUIP	PICKS	72.95
9	101-36420-53401	CUSTODIAL SUPPLIES	DEGREASER	40.78
10	101-36420-53403	LANDSCAPING SUPPLIES	BUSHES	514.00
11	101-36420-53403	LANDSCAPING SUPPLIES	BUSHES	180.25

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12	101-36420-53403	LANDSCAPING SUPPLIES	BUSHES	67.50
13	101-36420-53403	LANDSCAPING SUPPLIES	BUSHES	465.50
14	101-36420-53403	LANDSCAPING SUPPLIES	SEED	129.94
15	101-36420-53405	BLDG & GROUND MAINT SUPP	PARK STAFF GLOVES	15.00
16	101-36420-53405	BLDG & GROUND MAINT SUPP	MOUNTING HARDWARE	54.40
17	101-36420-53405	BLDG & GROUND MAINT SUPP	STAIN	203.36
18	101-36420-53405	BLDG & GROUND MAINT SUPP	CLAMPS	53.04
19	101-36420-53405	BLDG & GROUND MAINT SUPP	CLAMPS	86.89
20	101-36420-53405	BLDG & GROUND MAINT SUPP	GLUE	3.39
21	101-36420-53405	BLDG & GROUND MAINT SUPP	PLUMBING SUPPLIES	71.90
22	101-36420-53405	BLDG & GROUND MAINT SUPP	ROOF REPAIR CHESTNUT	57.95
23	101-36420-54306	EQUIPMENT RENTAL	CHESTNUT PORT-O-POTTY	161.95
		Total For Dept 36420 PUBLIC WORKS PARK MAINTENANCE		51,349.86
Dept 36471 PUBLIC WORKS FLEET SERVICES				
1	101-36471-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 06/05	32.68
2	101-36471-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 05/29	32.68
3	101-36471-52111	OTHER PROFESSIONAL SVCS	REPLACEMENT PLATE 341	8.00
4	101-36471-52111	OTHER PROFESSIONAL SVCS	REPLACEMENT PLATE 292	8.00
5	101-36471-52118	SOFTWARE MAINTENANCE	SOFTWARE UPDATE	747.79
6	101-36471-52703	MAINT-VEHICLES	ENGINE REPAIR 291	414.44
7	101-36471-53209	UNIFORMS	BOOTS - NEYFELDT	202.43
8	101-36471-53210	SMALL TOOLS & EQUIP	AIR CHUCK	13.77
9	101-36471-53210	SMALL TOOLS & EQUIP	SOCKET	40.31
10	101-36471-53211	OTHER SUPPLIES	HARDWARE	312.24
11	101-36471-53211	OTHER SUPPLIES	MOUNTING TAPE	12.74
12	101-36471-53211	OTHER SUPPLIES	HARDWARE	2.37
13	101-36471-53406	AUTO PARTS & SUPPLIES	SEAT PADS	558.42
14	101-36471-53406	AUTO PARTS & SUPPLIES	LAPTOP CRADLE 640	217.84

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15	101-36471-53406	AUTO PARTS & SUPPLIES	CREDIT - CORE RETURN	(60.93)
16	101-36471-53406	AUTO PARTS & SUPPLIES	FILTERS	86.96
17	101-36471-53406	AUTO PARTS & SUPPLIES	SEAT BELT	58.10
18	101-36471-53407	EQUIP MAINT PART&SUPPLIE	PIVOT	72.40
19	101-36471-53407	EQUIP MAINT PART&SUPPLIE	NOZZLES	54.88
20	101-36471-53407	EQUIP MAINT PART&SUPPLIE	BUBBLE LEVEL	20.40
21	101-36471-53407	EQUIP MAINT PART&SUPPLIE	AIR PLENUM 532	2,493.69
22	101-36471-53415	FUELS	DIESEL & FUEL #1916061	5,828.73
		Total For Dept 36471 PUBLIC WORKS FLEET SERVICES		11,157.94
		Dept 67001 RECREATION ADMINISTRATION		
1	101-67001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	210.33
2	101-67001-51654	MEMBERSHIPS & SUBSCRIP	BMI LICENSE 2025	446.00
		Total For Dept 67001 RECREATION ADMINISTRATION		656.33
		Dept 67920 RECREATION SPECIAL RECREATION		
1	101-67920-52116	SRA PROGRAMS	PLAYGROUND MULCH	1,440.00
		Total For Dept 67920 RECREATION SPECIAL RECREATION		1,440.00
		Dept 67935 RECREATION DANCE		
1	101-67935-53211	OTHER SUPPLIES	VIDEO RECORDING SERVICES - APR 4TH '25, MAY 3 '25	2,437.50
		Total For Dept 67935 RECREATION DANCE		2,437.50
		Dept 67965 RECREATION ATHLETICS		
1	101-67965-52115	RECREATION PROGRAM SERVICE	PICKLEBALL SPRING SESSIONS	679.89
2	101-67965-52115	RECREATION PROGRAM SERVICE	PICKLEBALL SPRING SESSIONS	162.75
3	101-67965-52115	RECREATION PROGRAM SERVICE	TRACK & FIELD - SPRING 2	238.83
4	101-67965-52115	RECREATION PROGRAM SERVICE	BASKETBALL - SPRING 2	436.10
5	101-67965-52115	RECREATION PROGRAM SERVICE	RIDING - 4 PARTICIPANTS	1,008.00
6	101-67965-52115	RECREATION PROGRAM SERVICE	LAK100 MARCH PARTICIPANTS 2	346.50

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7	101-67965-52115	RECREATION PROGRAM SERVICE	ICE SKATING - MAY	881.25
8	101-67965-52115	RECREATION PROGRAM SERVICE	ICE SKATING - MAY	232.50
9	101-67965-52115	RECREATION PROGRAM SERVICE	SAKASHITA - APR	239.25
Total For Dept 67965 RECREATION ATHLETICS				4,225.07
<b>Total For Fund 101 GENERAL</b>				<b>285,330.05</b>
<b>Fund 202 MOTOR FUEL TAX</b>				
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	202-36001-52701	MAINT-BLDGS & GROUNDS	LCDOT SIGNAL MAINT QUENTIN/ENSELL	244.19
2	202-36001-52701	MAINT-BLDGS & GROUNDS	MAIN ST SIGNAL MAINT	216.74
3	202-36001-52701	MAINT-BLDGS & GROUNDS	2025 MULCH CONTRACT	2,831.83
4	202-36001-52701	MAINT-BLDGS & GROUNDS	2025 MOWING CONTRACT	2,534.38
5	202-36001-53201	ELECTRICITY	STREETLIGHT ELECTRIC	281.56
6	202-36001-53201	ELECTRICITY	STREETLIGHT ELECTRIC	36.05
Total For Dept 36001 PUBLIC WORKS ADMINISTRATION				6,144.75
<b>Total For Fund 202 MOTOR FUEL TAX</b>				<b>6,144.75</b>
<b>Fund 207 SPECIAL EVENTS FUND</b>				
Dept 67603 RECREATION FARMERS MARKET				
1	207-67603-45952	VENDOR FEE	REFUND - FARMERS MARKET DEPOSIT 2025	22.00
2	207-67603-45952	VENDOR FEE	REFUND - FARMERS MARKET DEPOSIT 2025	20.00
3	207-67603-52115	RECREATION PROGRAM SERV	FARMERS MARKET BAND 6/27	200.00
4	207-67603-52115	RECREATION PROGRAM SERV	FARMERS MARKET BAND 6/20	200.00
5	207-67603-54302	PUBLIC RELATIONS	JULY 4TH, FM POSTCARDS	1,160.56
6	207-67603-54302	PUBLIC RELATIONS	FRMS MKT MAILING - MAY '25	1,512.39
Total For Dept 67603 RECREATION FARMERS MARKET				3,114.95

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Dept 67604 RECREATION FOURTH OF JULY FESTIVAL				
1	207-67604-52115	RECREATION PROGRAM SERV	2025 JULY 4TH GOLF CART RENTAL	1,195.00
2	207-67604-52115	RECREATION PROGRAM SERV	JULY 4TH 2025 PROGRAM SERVICE	1,500.00
3	207-67604-52115	RECREATION PROGRAM SERV	2025 JULY 4TH DJ SERVICE	1,200.00
4	207-67604-52115	RECREATION PROGRAM SERV	4TH OF JULY BAND	2,000.00
5	207-67604-54302	PUBLIC RELATIONS	JULY 4TH, FM POSTCARDS	1,160.57
Total For Dept 67604 RECREATION FOURTH OF JULY FESTIVAL				7,055.57
<b>Total For Fund 207 SPECIAL EVENTS FUND</b>				<b>10,170.52</b>
<b>Fund 227 DISPATCH CENTER</b>				
Dept 24220 POLICE DISPATCH				
1	227-24220-53209	UNIFORMS	FLEECE, BADGE, SHIRTS, PANTS - CUPELLO	392.55
2	227-24220-53209	UNIFORMS	PANTS, SHIRTS, SOCKS, ZIP - LEUTHOUDOM	283.84
3	227-24220-53209	UNIFORMS	SHIRT - STEFFY	95.42
4	227-24220-53209	UNIFORMS	SHIRTS, PANTS - STEFFY	244.07
Total For Dept 24220 POLICE DISPATCH				1,015.88
<b>Total For Fund 227 DISPATCH CENTER</b>				<b>1,015.88</b>
<b>Fund 310 TIF #1 DEBT SERVICE</b>				
Dept 10490 GENERAL GOVERNMENT TIF				
1	310-10490-56604	BOND ISSUE FEES	CLOSING COSTS 2025 SHORT TERM BOND	6,500.00
2	310-10490-56604	BOND ISSUE FEES	BOND ISSUANCE FEES	6,500.00
Total For Dept 10490 GENERAL GOVERNMENT TIF				13,000.00
<b>Total For Fund 310 TIF #1 DEBT SERVICE</b>				<b>13,000.00</b>



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<b>Fund 401 VILLAGE CAPITAL PROJECTS</b>				
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	401-36001-55252	BLDG & BLDG IMPROVEMENTS	PD HVAC ENGINEERING	2,900.00
2	401-36001-55252	BLDG & BLDG IMPROVEMENTS	FD CLEANING	750.00
3	401-36001-55252	BLDG & BLDG IMPROVEMENTS	CREDIT - TILE RETURN	(103.85)
4	401-36001-55252	BLDG & BLDG IMPROVEMENTS	CREDIT - TILE RETURN	(21.97)
5	401-36001-55252	BLDG & BLDG IMPROVEMENTS	BACK SPLASH TRIM FD	22.97
6	401-36001-55252	BLDG & BLDG IMPROVEMENTS	PIPE NEW PRESSURE WASHER	3.39
7	401-36001-55252	BLDG & BLDG IMPROVEMENTS	VH BUILDOUT - LUMBER	525.46
8	401-36001-55252	BLDG & BLDG IMPROVEMENTS	POLICE DEPT.PAINTING	23,736.52
Total For Dept 36001 PUBLIC WORKS ADMINISTRATION				27,812.52
<b>Total For Fund 401 VILLAGE CAPITAL PROJECTS</b>				<b>27,812.52</b>
<b>Fund 405 NHR CAPITAL PROJECTS</b>				
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	405-36001-53416	CONCRETE & ASPHALT	CONCRETE #125925	1,601.25
2	405-36001-53416	CONCRETE & ASPHALT	BLACKTOP #61119	594.09
3	405-36001-53416	CONCRETE & ASPHALT	BLACKTOP #61475	397.59
4	405-36001-53416	CONCRETE & ASPHALT	CONCRETE #002-93366	1,172.25
5	405-36001-55253	INFRASTRUCTURE IMPROVEMT	MAIN ST SIGNAL LOCATE	177.29
Total For Dept 36001 PUBLIC WORKS ADMINISTRATION				3,942.47
<b>Total For Fund 405 NHR CAPITAL PROJECTS</b>				<b>3,942.47</b>
<b>Fund 501 WATER &amp; SEWER</b>				
Dept 00000				
1	501-00000-21204	LC CONNECTION FEES PAYABLE	LC CONNECTION FEE - 154 OAK ST	4,030.00
2	501-00000-21204	LC CONNECTION FEES PAYABLE	LC CONNECTION FEE - 330 E IL RT 22 A	4,211.35

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3	501-00000-21204	LC CONNECTION FEES PAYABLE	LC CONNECTION FEE - 330 E IL RT 22 C	4,211.35
4	501-00000-21205	LC TREATMENT CHARGE PAYABLE	2025 1ST QTR COLLECTIONS	603,424.55
		Total For Dept 00000		615,877.25
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	501-36001-48306	SALE OF FIXED ASSETS	2025 JOHN DEERE 85P EXCAVATOR	(13,000.00)
2	501-36001-51654	MEMBERSHIPS & SUBSCRIP	VLG BUSINESS MEMBERSHIP 2025	62.32
3	501-36001-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 06/05	35.60
4	501-36001-52111	OTHER PROFESSIONAL SVCS	UNIFORMS/MATS 05/29	33.52
5	501-36001-53203	TELEPHONE & DATA SVCS	ANALOG LINES 2025 - JUN	151.98
6	501-36001-53203	TELEPHONE & DATA SVCS	SCADA CELLPHONE/MODEM CONNECTION - MAY	109.20
7	501-36001-53203	TELEPHONE & DATA SVCS	SCADA - APR	282.96
8	501-36001-53208	OFFICE SUPPLIES	NOTEBOOKS, RACK	72.20
		Total For Dept 36001 PUBLIC WORKS ADMINISTRATION		(12,252.22)
Dept 36550 PUBLIC WORKS WATER SERVICE				
1	501-36550-52111	OTHER PROFESSIONAL SVCS	STAFFING SERVICES - MAY	10,016.51
2	501-36550-52113	ENGR/ARCHITECTURAL	LMW ROUTE STUDY	8,816.70
3	501-36550-52113	ENGR/ARCHITECTURAL	ENGINEERING REIMBURSEMENT LMW PROJECT	64,684.60
4	501-36550-52113	ENGR/ARCHITECTURAL	ENGINEERING SERVICES	130,065.97
5	501-36550-52607	WATER SAMPLE ANALYSIS	WATER SAMPLE ANALYSIS	1,056.00
6	501-36550-52701	MAINT-BLDGS & GROUNDS	2025 MULCH CONTRACT	869.11
7	501-36550-52701	MAINT-BLDGS & GROUNDS	2025 MOWING CONTRACT	777.82
8	501-36550-53210	SMALL TOOLS & EQUIP	HOSE COUPLING FOR HYDRANT BARREL PUMP	7.30
9	501-36550-53403	LANDSCAPING SUPPLIES	TOPSOIL #235654, 235655	240.00
10	501-36550-53405	BLDG & GROUND MAINT SUPP	GAL NIPPLES	5.08
11	501-36550-53405	BLDG & GROUND MAINT SUPP	GAL NIPPLES	15.29
12	501-36550-53407	EQUIP MAINT PART&SUPPLIE	CHLORINE FEED PIPING REPAIR MATERIALS-WELL 9	17.80
13	501-36550-53410	METERS PARTS & SUPPLIES	REPLACEMENT OMNI METER REGISTERS	8,775.27

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14	501-36550-53414	CHEMICALS	BULK WTR COND SALT - WELL #12	2,584.26
15	501-36550-53414	CHEMICALS	BULK WTR COND SALT - WELL #9	2,536.38
16	501-36550-53414	CHEMICALS	CHLORINE	3,255.00
17	501-36550-53417	SAND & GRAVEL	GRAVEL #1670926, 1670960, 1670933	1,366.88
18	501-36550-55252	BLDG & BLDG IMPROVEMENTS	SECURITY ALARM SYSTEM UPGRADE - WELL 8	5,091.00
19	501-36550-55254	MACHINERY & EQUIPMENT	2025 JOHN DEERE 85P EXCAVATOR	166,067.91
Total For Dept 36550 PUBLIC WORKS WATER SERVICE				406,248.88
Dept 36560 PUBLIC WORKS SEWER SERVICE				
1	501-36560-52111	OTHER PROFESSIONAL SVCS	HYDROGEN SULFIDE REDUCT PRGM QUENTIN/NW PUMP STA	5,460.00
2	501-36560-53201	ELECTRICITY	ELECTRICITY/SANITARY FLOW CONTROL	64.63
3	501-36560-53211	OTHER SUPPLIES	DISPOSABLE GLOVES, TOWELS	492.46
Total For Dept 36560 PUBLIC WORKS SEWER SERVICE				6,017.09
<b>Total For Fund 501 WATER &amp; SEWER</b>				<b>1,015,891.00</b>
<b>Fund 615 EQUIPMENT REPLACEMENT</b>				
Dept 10001 GENERAL GOVERNMENT ADMINISTRATION				
1	615-10001-55254	MACHINERY & EQUIPMENT	MONITORS	459.98
Total For Dept 10001 GENERAL GOVERNMENT ADMINISTRATION				459.98
Dept 36001 PUBLIC WORKS ADMINISTRATION				
1	615-36001-55254	MACHINERY & EQUIPMENT	VER-MAC PCMS-548 HYD MESSAGE BOARD	16,360.00
2	615-36001-55263	VEHICLES - PUBLIC WORKS	ROAD TEMP SENSOR NEW 335	1,320.27
3	615-36001-55263	VEHICLES - PUBLIC WORKS	2025 FORD F150	42,321.00
4	615-36001-55263	VEHICLES - PUBLIC WORKS	2025 FORD F250 QUOTE# LZFF250	96,642.00
5	615-36001-55263	VEHICLES - PUBLIC WORKS	MODULE NEW 342	244.80

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6	615-36001-55263	VEHICLES - PUBLIC WORKS	MODULE NEW 335	244.80
		Total For Dept 36001 PUBLIC WORKS ADMINISTRATION		157,132.87
<b>Total For Fund 615 EQUIPMENT REPLACEMENT</b>				<b>157,592.85</b>
<b>Fund 710 PERFORMANCE ESCROW</b>				
Dept 00000				
1	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0596 - 444 S RAND RD	3,300.00
2	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0014 - 176 WASHO CT	300.00
3	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0401 - 444 S RAND RD	1,000.00
4	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0163 - 501 CAROLIAN DR	500.00
5	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0396 - 15 PINE AVE	1,001.00
6	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0405 - 15 PINE AVE	1,020.00
7	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0646 - 15 PINE AVE	1,600.00
8	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0548 - 716 FOXMOOR LN	500.00
9	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0167 - 888 SURRYSE RD	500.00
10	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0174 - 260 ROSEHALL #21	500.00
11	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0562 - 34 E MAIN ST	250.00
12	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0196 - 5 MANOR RD	500.00
13	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0096 - 598 DUNHILL DR	300.00
14	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0632 - 189 S RAND RD	1,000.00
15	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0452 - 1109 PEARLMAN	1,200.00
16	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0416 - 1109 PEARLMAN	500.00
17	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD24-0591 - 568 APPLGATE LN	500.00
18	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0082 - 568 APPLGATE LN	300.00
19	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0095 - 291 S RAND RD	1,000.00
20	710-00000-25201	BUILDING PERMIT DEPOSITS	BOND REF #BBD25-0098 - 291 S RAND RD	1,000.00
		Total For Dept 00000		16,771.00

**VILLAGE OF LAKE ZURICH**  
WARRANT REPORT - 6/16/2025  
**\$1,554,084.21**

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Item	GL Number	GL Desc	Invoice Description	Amount
		Dept 17001 TECHNOLOGY ADMINISTRATION		
1	710-17001-53214	PEG CABLE EXPENSE	COMBINED INTERNET - MAY/JUN 2025	1,401.14
		Total For Dept 17001 TECHNOLOGY ADMINISTRATION		1,401.14
		Total For Fund 710 PERFORMANCE ESCROW		18,172.14
		Fund 720 PAYROLL CLEARING		
		Dept 00000		
1	720-00000-22404	SUPPLEMENTAL LIFE INS PAYABLE	GROUP LIFE INSURANCE - JUN	140.00
		Total For Dept 00000		140.00
		Total For Fund 720 PAYROLI		140.00
		Fund 731 SSA #8 HEATHERLEIGH SUBDV		
		Dept 10099 GENERAL GOVERNMENT SSA ACTIVITY		
1	731-10099-52604	SWEEPING & MOWING	2025 MULCH CONTRACT	389.28
2	731-10099-52604	SWEEPING & MOWING	2025 MOWING CONTRACT	348.38
		Total For Dept 10099 GENER		737.66
		Total For Fund 731 SSA #8 H		737.66
		Fund 734 SSA #11 LZ PINES SUBDV		
		Dept 10099 GENERAL GOVERNMENT SSA ACTIVITY		
1	734-10099-52604	SWEEPING & MOWING	2025 MULCH CONTRACT	16.01
2	734-10099-52604	SWEEPING & MOWING	2025 MOWING CONTRACT	14.33
		Total For Dept 10099 GENER		30.34
		Total For Fund 734 SSA #11		30.34

**VILLAGE OF LAKE ZURICH**  
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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
<b>Fund 735 SSA #13 CONVENTRY CRK SUB</b>				
Dept 10099 GENERAL GOVERNMENT SSA ACTIVITY				
1	735-10099-52603	LAKE/WATER QUALITY MGMT	2025 NATURAL AREA MAINT SSA #13	13,440.00
2	735-10099-52604	SWEEPING & MOWING	2025 MULCH CONTRACT	350.42
3	735-10099-52604	SWEEPING & MOWING	2025 MOWING CONTRACT	313.61
Total For Dept 10099 GENERAL GOVERNMENT SSA ACTIVITY				14,104.03
<b>Total For Fund 735 SSA #13 CONVENTRY CRK SUB</b>				<b>14,104.03</b>

**VILLAGE OF LAKE ZURICH**  
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<i>Item</i>	<i>GL Number</i>	<i>GL Desc</i>	<i>Invoice Description</i>	<i>Amount</i>
<b>Fund Totals:</b>				
			Fund 101 GENERAL	285,330.05
			Fund 202 MOTOR FUEL TAX	6,144.75
			Fund 207 SPECIAL EVENTS FUND	10,170.52
			Fund 227 DISPATCH CENTER	1,015.88
			Fund 310 TIF #1 DEBT SERVICE	13,000.00
			Fund 401 VILLAGE CAPITAL PROJECTS	27,812.52
			Fund 405 NHR CAPITAL PROJECTS	3,942.47
			Fund 501 WATER & SEWER	1,015,891.00
			Fund 615 EQUIPMENT REPLACEMENT	157,592.85
			Fund 710 PERFORMANCE ESCROW	18,172.14
			Fund 720 PAYROLL CLEARING	140.00
			Fund 731 SSA #8 HEATHERLEIGH SUBDV	737.66
			Fund 734 SSA #11 LZ PINES SUBDV	30.34
			Fund 735 SSA #13 CONVENTRY CRK SUB	14,104.03
				<u><u>\$ 1,554,084.21</u></u>



*At the Heart of Community*

OFFICE OF THE VILLAGE MANAGER

70 East Main Street  
Lake Zurich, Illinois 60047

(847) 438-5141  
LakeZurich.org

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Date: June 10, 2025  
To: Ray Keller, Village Manager *RK*  
From: Michael Duebner, Assistant Village Manager  
Cc: Steve Husak, Chief of Police  
Colin Gaffney, Deputy Chief of Police  
Subject: CCTV and Security Door Updates at the Police Department

---

AGENDA ITEM

*6c*

**Issue:** Traditionally, the entry doors to the Police Department have been open to the public 24 hours a day, 7 days a week. During business hours, records staff has assumed the role of reception, while dispatch staff assumes that role after hours and on weekends. When dispatch staff's transitions to the regional consolidated dispatch center in Libertyville, LakeComm, the lobby will need to be secured after hours and various other doors equipped for self-service.

**Analysis:** It may not come as a surprise that the main entry doors at the Police Department are not equipped with a lock. There simply was no need to secure the lobby since the dispatch staff is on duty 24 hours a day, 7 days a week and are able to view activity through a window or CCTV monitors. They were able to open various secure doors to police officers and residents that used the community room. In the absence of a dispatch staff within the building, it is imperative to expand the existing CCTV and access control system in several key areas to incorporate self-service and remote-control functionalities.

The Village has relied on ESSCOE, LLC, located in the business park to install and maintain the CCTV and access control in the Police Department building for many years. Such systems are tightly integrated and are technically complex that staff has requested a proposal to upgrade both systems to meet the new challenges. After several design meetings a proposal in the amount of \$62,856.29 was received. Additional equipment and installation thereof is expected to provide remote monitoring of some areas by LakeComm s outside the scope of this proposal and will be addressed at a future date.



The various sections of the enclosed proposal have been redacted due to the critical infrastructure designation of police departments by Homeland Security. Disclosing certain information could potentially compromise the security of the building and its personnel.

**Recommendation:** Staff is requesting authorization to execute contracts to expand the CCTV and door access control system in the Police Department in the amount not to exceed \$70,000.

Attachment: ESSCOE, LLC Proposal

ILLINOIS LIC. NO.: 127.001301



Lake Zurich Police Department  
200 Mohawk Trail  
Lake Zurich, IL 60047  
United States of America

PROJECT: Lake Zurich PD / 911 locations  
modifications

QUOTE # CRGSQ1027-02

DATE: May 27, 2025

(847) 719-1690 x6366

SALESPERSON: **Chris Skupa**  
cskupa@esscoe.com

### System Quote

This Quote ("Quote") is based on the requirements of Customer as provided in a request for proposal or bid offer ("RFP") and is subject to ESSCOE Terms and Conditions ("Terms and Conditions") attached hereto. Any changes to or deviations from the RFP requested by Customer shall be quoted separately. This Quote is valid for thirty (30) days from the date issued above, unless the Customer and ESSCOE both execute this document creating a contract ("Agreement").

QTY	MODEL NO	DESCRIPTION	EXT PRICE
		--- [REDACTED] (5 Doors / 10 Readers) --	
10	[REDACTED]	[REDACTED]	
10	[REDACTED]	[REDACTED] -- 4 years	
5	SY-MR52-S3	[REDACTED] interface module Series 3 (8 inputs, 6 relays, PCB only, software connections included)	
12	RB1224	RELAY 12-24VDC @5A DPDT	
1	TMV2	MERCURY DOOR BACKPLANE FOR TROVE2 AND TROVE3 ENCLOSURES	
1	ACM8	ACCESS POWER CONTROLLER, EIGHT (8) TRIGGER INPUTS, EIGHT (8) FUSE PROTECTED OUTPUTS. FIRE ALARM INTERFACE.	
1	Installation - SEC	Installation Labor Charges - Electric Installation Services	
1	Technical Service - SEC	Technical System Service Charge - Security	
1	CAD - SEC	System Design/Drafting Services - Security	
1	PM - SEC	Project Management - Security	
		--- [REDACTED] (5 Doors / 10 Readers) -- Total	\$28,318.00
		-- [REDACTED] Access Control Door / [REDACTED] Door --	
1	[REDACTED]	[REDACTED]	
1	18012WGB	3/4 Recessed Door Contact	

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QTY	MODEL NO	DESCRIPTION	EXT PRICE
1	DS160	PIR REQUEST TO EXIT SENSOR WITH SOUNDER GRAY	
1	TP160	TRIM PLATE FOR DS150/DS160	
1	EFLOW102NB	POWER SUPPLY, 12VDC @ 10 AMP BOARD ONLY, FIRE ALARM DISCONNECT, LOW POWER SHUTDOWN	
2			
1	SY-MR52-S3	Mercury MR52 2-reader interface module Series 3 (8 inputs, 6 relays, PCB only, software connections included)	
1	TMV2	MERCURY DOOR BACKPLANE FOR TROVE2 AND TROVE3 ENCLOSURES	
1		offers two channels with 2MP per channel, at a frame rate of up to 60 fps. With its unique design, this multidirectional camera offers cost-effective installation and flexible positioning of both varifocal camera heads. Each head	
	Panoramic Camera		
1	ACM8	ACCESS POWER CONTROLLER, EIGHT (8) TRIGGER INPUTS, EIGHT (8) FUSE PROTECTED OUTPUTS. FIRE ALARM INTERFACE.	
1	GSC-0m-P-1C	1 camera connection	
1			
1	Installation - SEC	Installation Labor Charges - Locksmith Installation Services Access Door	
1	Installation - SEC	Installation Labor Charges - Locksmith Installation Services Secure Door	
1	Installation - SEC	Installation Labor Charges - Electric Installation Services	
1	Technical Service - SEC	Technical System Service Charge - Security	
1	CAD - SEC	System Design/Drafting Services - Security	
1	PM - SEC	Project Management - Security	
		-- -- Total	\$20,918.54
		-- -- Door --	
1			
1	18012WGB	3/4 Recessed Door Contact	
1	DS160	PIR REQUEST TO EXIT SENSOR WITH SOUNDER GRAY	
1			
1		-reader interface module Series 3 (8 inputs, 6 relays, PCB only, software connections included)	
1	Installation - SEC	Installation Labor Charges - Locksmith Installation Services	
1	Installation - SEC	Installation Labor Charges - Electric Installation Services	
1	Technical Service - SEC	Technical System Service Charge - Security	
1	CAD - SEC	System Design/Drafting Services - Security	
1	PM - SEC	Project Management - Security	
		-- -- Total	\$7,572.75
		-- --	
1			

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QTY	MODEL NO	DESCRIPTION	EXT PRICE
1	18012WGB	3/4 Recessed Door Contact	
1	DS160	PIR REQUEST TO EXIT SENSOR WITH SOUNDER GRAY	
1	TP160	TRIM PLATE FOR DS150/DS160	
1			
1	Installation - SEC	Installation Labor Charges - Electric Installation Services	
1	Technical Service - SEC	Technical System Service Charge - Security	
1	CAD - SEC	System Design/Drafting Services - Security	
1	PM - SEC	Project Management - Security	
		-- Total	\$5,847.00
1	Freight	Inbound/Outbound Freight & Handling	

TOTAL PRICING:		
SUB TOTAL		\$62,856.29
SALES TAX:		\$0.00
TOTAL:		\$62,856.29

#### QUOTE SUMMARY

Esscoe to provide access control to 8 door opens, [REDACTED] locations at Lake Zurich Police Dept. Proposal is based on the Esscoe walkthrough of the noted locations and requests..

#### Detailed Scope of Work:

##### Scope of work:

\*\*\* [REDACTED] Access Control installation \*\*\*

Provide (10) card readers at 5 Door open locations for [REDACTED]

Provide and install (10) 22/6 shielded plenum cables in the [REDACTED] to the existing openings.

for (10) new card readers only (door strikes are existing on the Interlock system)

Install and terminate card access devices provided in the proposal.

Provide and install White wiremold/boxes with security screws where needed

Provide and install a 3/4" conduit from the existing ACP panel to the Interlock Panel.

All interconnections to the existing [REDACTED] lock will be terminated between the existing access control panel and existing

[REDACTED] lock interface panel located in the [REDACTED] Room.

[REDACTED] hardware and licensing provided in the proposal.

Includes final programming and testing of newly installed devices.

\*\*\* [REDACTED] Access Control installation \*\*\*

Provide and install (1) 22/6 shielded, (1) 18/2 non shielded, (1) 22/2 non shielded and (1) 22/4 non shielded plenum cables for (1) new full card reader door. Install and terminate card access devices provided in the proposal.

[REDACTED] provided in the proposal.

Provide and install (3) cat6 plenum cables to the main entrance, [REDACTED], (1) for an Intercom/phone(device provided by owner) and (1) for spare future use. Provide and install White wiremold and boxes where needed.

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Install card access hardware provided per proposal.

hardware and licensing provided in the proposal.

Includes final programming and testing of newly installed devices.

Lock hardware installation and modifications listed out with LOCK HARDWARE INSTALLATIONS / MODIFICATIONS below.

Note: door will only have lock hardware modified without access control.

\*\*\* Door Access Control installation \*\*\*

Provide and install (1) 22/6 shielded, (1) 18/2 non shielded, (1) 22/2 non shielded and (1) 22/4 non shielded plenum cables for (1) new full card reader door.

Install and terminate card access devices provided in the proposal.

Provide White wiremold/boxes and conduit box and stubs where needed.

Install card access hardware provided per proposal.

Existing strike currently installed will be wired to the access control system.

\*\*\* Door Access Control installation \*\*\*

Provide and install (1) 22/6 shielded, (1) 18/2 non shielded, (1) 22/2 non shielded and (1) 22/4 non shielded plenum cables for (1) new full card reader door.

Install and terminate card access devices provided in the proposal.

hardware and licensing provided in the proposal.

Includes final programming and testing of newly installed devices.

Provide White wiremold/boxes and conduit box and stubs where needed.

Install card access hardware provided per proposal.

Lock hardware installation and modifications listed out with LOCK HARDWARE INSTALLATIONS / MODIFICATIONS below.

\*\*LOCK HARDWARE INSTALLATIONS / MODIFICATIONS\*\*

\*\*\* Door Lock hardware installation\*\*\*

Labor to modify the door frame and install an electric strike.

1 HES 1600CLB-12/24VDC-630 electric strike and faceplate.

\*\*\* Door Lock hardware installation\*\*\*

Labor to remove the existing dummy exit device. Modify the door and install a new exit device. Modify the frame and install an electric strike.

1 Von Duprin 33A-NL-OP-626-3ft-RHR exit device

1 ILCO 26D rim cylinder

1 HES 9400/9600-630 electric strike

1 Custom 1/2 inch spacer for electric strike

\*A temporary key cylinder will be installed. If needed, the building to install a master keyed cylinder.

\*\*\* Door Lock hardware installation\*\*\*

Labor to remove the existing dummy exit device. Modify the door and install a new exit device.

1 Von Duprin 33A-EO-626-3ft-LHR exit device

1 Custom 1/2 inch spacer for strike

Please Note:

This price is subject to change at any time due to fluctuations in U.S. tariffs.

See quote for devices to be purchased.

Excludes:

After hours / over time work

Repairs of any device on the existing Genetec Security Center Access Control / VMS found non functional during the installation of this proposal.

Sales & Use Taxes unless noted

Permit Fees, Plan Review Fees, Permit Applications

Central or Remote Station Monitoring Services

Videography/Recording services

BIM or 3-Dimensional Drawings

Project Insurance Requirements with any special endorsement requirements or outside our \$2MM per occurrence maximum, \$4MM aggregate and \$5MM umbrella policy

Items not shown, scheduled, detailed or specified on the plan drawings, diagrams or specifications.

Credit Card Processing or vendor payment portal participation fees of any kind for invoice submission and payments, these will be additional charges

Items contained in this proposal may not comply with federally funded regulations requiring compliance with the Buy America Act or the Buy American Act. Purchasers are strictly cautioned that any flow down clauses requiring such compliance are excluded from this proposal. Any costs to comply with this may significantly increase the price, the scope and length of time to complete any work contemplated.

Any bid, performance, payment or other surety guarantees of any kind.

The above quoted project will be subject to progress billing, wherein an invoice will be issued for the portion that has been completed or stored to date. Payment terms are Net 30. Essco requires payment to 90% of the contracted amount to certify the system for occupancy, owner training or other beneficial uses.

Qualifications and Assumptions:

- Taxes and freight are included
- One year warranty on all parts and labor is included
- All work to be performed during normal business hours
- Programming and testing are included
- All Network / POE ports by client

Contact me if I can be of further assistance.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the date first written above by their respective officers thereunto duly authorized.

**For Client: Lake Zurich Police**

**For ESSCOE, LLC:**

\_\_\_\_\_  
SIGNATURE OF AUTHORIZED REPRESENTATIVE

\_\_\_\_\_  
SIGNATURE OF AUTHORIZED REPRESENTATIVE

\_\_\_\_\_  
PRINTED NAME | TITLE

\_\_\_\_\_  
PRINTED NAME | TITLE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PURCHASE ORDER/CONTRACT NO.

**THANK YOU FOR YOUR BUSINESS!**

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**Convergent Technologies Terms and Conditions (Install & T&M)****Version 4.1 (US AND CANADA) September 2024**

Throughout this Proposal, including these Terms and Conditions and any attachments, (together, "Agreement") the term "Convergent" refers to the Convergent Technologies affiliate operating in the state/province in which the Work is being performed and "Convergent Related Parties" means Convergent and its contractors, subcontractors, third party product manufacturers or providers.

**SECTION 1. THE WORK**

This Agreement takes precedence over and supersedes all prior proposals, correspondence, and oral or written agreements or representations relating to the work set forth in the attached scope of work ("Work"). This Work commences on the start date and will be performed pursuant to the schedule specified in the attached scope of work and, subject to any change orders or addendums, represents the entire agreement between Convergent and Customer. This Agreement applies to the exclusion of any other terms that the Customer seeks to impose or incorporate (such as Customer's purchase order form) which are in addition to or inconsistent with the terms and conditions of this Agreement, or which are implied by trade, custom, practice or course of dealing, all of which are deemed expressly rejected and will not be binding.

This Agreement is made without regard to compliance with any special sourcing and/or manufacturing requirements, minority or disadvantaged supplier requirements, or similar government procurement laws. Should such requirements be applicable to this Agreement, Convergent reserves the right to modify and/or withdraw its Agreement.

Customer understands that Convergent is an authorized distributor or reseller and not the manufacturer or developer ("OEM") of software, hardware and equipment (collectively, "Third Party Products") purchased by Customer and certain services are delivered to Customer by such OEM.

Convergent agrees in accordance with the mutually agreed project schedule:

- a. To submit shop drawings, product data, samples and similar submittals if required in performing the Work;
- b. To pay for all labor, materials, equipment, tools, supervision, programming, testing, startup and documentation required to perform the Work in accordance with the Agreement;
- c. Secure and pay for permits and governmental fees, licenses, and inspections necessary for proper execution and completion of the Work, unless local regulations provide otherwise; and
- d. Hire subcontractors and order material to perform part of the Work, if necessary, while remaining responsible for the completion of the Work.

Customer agrees in accordance with the mutually agreed project schedule, and at no cost to Convergent:

- a. To promptly approve submittals provided by Convergent;
- b. To provide access to all areas of the site which are necessary to complete the Work;
- c. To supply suitable electrical service as required by Convergent;
- d. To remove site obstacles and job safety hazards;
- e. To promptly participate and approve acceptance testing, if applicable;
- f. Upon completion of commissioning or agreed to acceptance criteria, to promptly provide sign-off establishing job closeout; and
- g. That in the event of any emergency or systems failure, reasonable safety precautions will be taken by Customer to protect life and property during the period from when Convergent is first notified of the emergency or failure and until such time that Convergent notifies the Customer that the systems are operational or that the emergency has cleared.

THE WORK AND/OR THIRD PARTY PRODUCTS ARE DESIGNED TO HELP REDUCE, BUT NOT ELIMINATE RISKS OF LOSS RELATING TO PEOPLE, PREMISES, OR PROPERTY. THE AMOUNTS BEING CHARGED BY CONVERGENT ARE NOT SUFFICIENT TO GUARANTEE THAT LOSS OR DAMAGE WILL DECREASE OR BE ELIMINATED. Customer acknowledges that proper safety and security requires a multi-layered approach of people, processes, safety, and technologies. The Work, including Third Party Products, provided by Convergent is not sufficient to ensure overall safety and security. Customer acknowledges and agrees that it is responsible for its overall safety and security, including testing and maintenance of the Third Party Products (except to the extent contracted to Convergent by written agreement) and training of its personnel. Customer acknowledges and agrees that it has a duty of care and is solely responsible for its compliance with applicable laws, rules, and regulations, including but not limited to export and re-export restrictions and regulations, privacy and data protection regulations, applicable OEM instructions, terms and conditions, EULAs, and proper product usage.

Risk of loss, including any Third Party Product comprising the Work, shall pass to Customer as the Work is completed and the materials are incorporated into the Work at Customer's site subject to any end user license agreements. If or Third Party Products are earlier stored on Customer's site pursuant to agreement between Customer and Convergent, risk of loss with respect to such or Third Party Product shall pass to Customer upon delivery to Customer's site.

Applicable to Monitoring Services Only: If Monitoring Services are identified in the Proposal, the parties agree that (a) these Terms and Conditions are not applicable, and (b) Monitoring Services are governed by the Monitoring Services Terms and Conditions effective on the Effective Date of the Proposal and available at <https://www.convergent.com/terms>, which is incorporated by reference as if set forth herein in full. "Monitoring Services" is defined as "Services" in the Monitoring Services Terms and Conditions.

**SECTION 2. PRICING**

Pricing and amounts proposed shall remain valid for 30 days unless otherwise specified. Price includes only the Third Party Products listed based on Convergent's interpretation of plans and specifications unless noted otherwise. Additional Third Party Products, unless negotiated prior to order placement, will be billed accordingly. Sales taxes (or as applicable GST, PST, VAT or similar tax) and any other taxes assessed on Customer shall be added to the price upon invoice to Customer.

**SECTION 3. INVOICE REMITTANCE AND PAYMENT**

Customer agrees to pay Convergent fifty (50%) percent of the total price as a mobilization fee at the time of executing this Agreement.

If the Work is performed over more than one month, Convergent will invoice Customer each month for the Work performed during the previous month. Customer agrees to pay the amount due to Convergent as invoiced, within thirty (30) days of the date of such invoice. If the Work is

completed in less than one month, Customer agrees to pay Convergent in full after the Work has been completed within thirty (30) days of the date of invoice. Invoices shall not be subject to a project retention percentage and payment to Convergent shall not be conditioned on payment by an upstream party. If Customer is overdue in any payment, Convergent shall be entitled to suspend the Work without liability until paid, charge Customer an interest rate 1 and 1/2% percent per month (or the maximum rate permitted by law, whichever is less), and may avail itself of any other legal or equitable remedy. Customer shall reimburse Convergent costs incurred in collecting any amounts that become overdue, including attorney fees, court costs and any other reasonable expenditure.

**SECTION 4. WARRANTY**

Warranties for Convergent's services and Third Party Products are described in the Limited Warranty for Products and Services available at <https://www.convergent.com/terms/>, which is in effect as of the effective date of this Agreement and is incorporated by reference as if set forth herein in full.

**SECTION 5. CHANGES**

Without invalidating this Agreement or any bond given hereunder, Customer or Convergent may request changes in the Work with a change order signed by both parties. If Customer orders (i) any changes to the Work (e.g. change in objective, deliverables, tasks or hours), (ii) changes to schedule (extension or acceleration), or (iii) causes any material interference with Convergent's performance of the Work, Convergent shall be entitled to an equitable adjustment in the time for performance and in the Price, including a reasonable allowance for overhead and profit.

**SECTION 6. FORCE MAJEURE**

Neither Customer nor Convergent shall be liable for any delay or failure in the performance of their respective obligations pursuant to this Agreement due to circumstances beyond their reasonable control ("Force Majeure") and without the fault or negligence of the party experiencing such delay. A Force Majeure event shall include, but not be limited to: acts of God, pandemic or epidemic, diseases, quarantines, unavoidable casualties, concealed conditions, acts of any civil or military authority, riot, insurrections, and civil disturbances; war, invasion, act of foreign enemies, hostilities (regardless of whether or not war is declared), rebellion, revolution, terrorist activities; strikes, lockouts or other labor disputes; embargoes; shortage or unavailability of labor, supplies, materials, equipment or systems; accident, fire, storm, water, flooding, negligence of others, vandalism, power failure, installation of incompatible equipment, improper operating procedures, source current fluctuations or lighting, transportation contingencies; laws, statutes, regulations, and other legal requirements, orders or judgments; acts or order of any government or agency or official thereof, other catastrophes or any other similar occurrences. If performance by either party is delayed due to Force Majeure, the time for performance shall be extended for a period of time reasonably necessary to overcome the effect of the delay and Convergent shall be entitled to an equitable adjustment of the Price.

**SECTION 7. INSURANCE**

In lieu of any Customer insurance requirements, for Services performed in the United States, Convergent shall maintain the following insurance coverages during the term of this Agreement and upon request, shall provide certificates of insurance to the Customer:

Worker's Compensation	Statutory Limits
Employer's Liability	\$1,000,000 per occurrence/aggregate
Commercial General Liability	\$1,000,000 per occurrence \$2,000,000 general aggregate
Automobile Liability	\$1,000,000 per occurrence/aggregate
Excess/Umbrella Liability	\$3,000,000 per occurrence/aggregate

Commercial General Liability policy shall name the Customer as "additional insured" on a primary/noncontributory basis with respect to liability arising out of the Services, as applicable, but only to the extent of liabilities falling within the indemnity obligations of Convergent pursuant to the terms of this Agreement. Convergent shall not provide loss runs or copies of its insurance policies. Convergent shall provide to the Customer no less than thirty (30) days' notice prior to the termination or cancellation of any such insurance policy. For services performed in Canada, Convergent shall maintain similar insurance coverage dependent upon the local requirements in Canada and upon the insurance available under Convergent's insurance program. All required insurance coverage shall be reasonable in the circumstances and compliant with local regulations.

**SECTION 8. INDEMNIFICATION**

To the fullest extent allowed by law, Convergent shall indemnify and hold Customer harmless from and against claims, damages, losses, and expenses (excluding loss of use) attributable to bodily injury, sickness, disease or death, or to destruction of tangible property, but only to the extent caused by the negligent acts or omissions of Convergent or Convergent's employees or subcontractors while on Customer's site.

If Convergent is providing products or services for intrusion detection, detection of specific threats to people or property (including gunshot, or drone detection), mass notification, ballistics or explosives protection, or processing of biometric, health, financial, or government identifier data (collectively, "Special Offerings"), then to the fullest extent allowed by law (i) Convergent's indemnification obligations under the Agreement do not apply whatsoever and Convergent Related Parties have no liability to Customer for any losses or damages caused by any Special Offerings; and (ii) Customer shall indemnify, defend, and hold harmless Convergent Related Parties, from and against all claims, demands, actions, liabilities, damages, and costs (including reasonable attorneys' fees) relating to Special Offerings provided by Convergent, except to the extent of Convergent's gross negligence installing such Special Offerings. Any waiver of damages or limitation of liability contained in the Agreement and as modified herein shall not apply to Customer's indemnification, hold harmless and defense obligations herein.

Applicable to Weapons Detection Only: If Convergent provides Weapons Detection Systems or Services, then such Systems and Services are further governed by the Weapons Detection Addendum effective on the Effective Date of this Proposal and available at <https://www.convergent.com/terms>, which is incorporated by reference as if set forth herein in full. "Weapons Detection Systems or Services" means any "Systems" and/or "Services" as each are defined in the Weapons Detection Addendum.



**SECTION 9. LIMITATION OF LIABILITY**

EXCEPT AS PROVIDED HEREIN, TO THE FULLEST EXTENT ALLOWED BY LAW: (A) IN NO EVENT SHALL EITHER CONVERGINT RELATED PARTIES, OR CUSTOMER BE LIABLE UNDER OR IN CONNECTION WITH THIS PROPOSAL FOR SPECIAL, INDIRECT, INCIDENTAL, PUNITIVE, LIQUIDATED OR CONSEQUENTIAL DAMAGES, INCLUDING COMMERCIAL LOSS, LOSS OF USE OR LOST PROFITS, EVEN IF THAT PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES AND (B) THE AGGREGATE LIABILITY OF CONVERGINT RELATED PARTIES ARISING OUT OF OR RELATED TO THIS AGREEMENT SHALL NOT EXCEED THE AMOUNTS PAID BY CUSTOMER TO CONVERGINT UNDER THIS AGREEMENT. THE EXISTENCE OF MORE THAN ONE CLAIM WILL NOT ENLARGE THIS LIMIT. THE LIMITATION SET FORTH IN THIS SECTION SHALL APPLY WHETHER THE CLAIM IS BASED ON CONTRACT, WARRANTY, TORT (INCLUDING NEGLIGENCE) OR OTHER LEGAL THEORY.

**SECTION 10. COMPLIANCE WITH LAW, SAFETY, & SITE CONDITIONS**

Convergent agrees to comply with all laws, rules, and regulations applicable to its provision of the Work. Customer will comply with all applicable laws and agreements applicable to its use and operation of the Work. Convergent shall comply with all safety related laws and regulations and with the safety program of the Customer, provided such program is supplied to Convergent prior to beginning Work.

If during the course of its Work, Convergent encounters conditions at the site that are subsurface, differ materially from what is represented in the contract documents, or otherwise concealed physical conditions, Convergent shall be entitled to an extension of time and additional costs for the performance of its work.

If Convergent discovers or suspects the presence of hazardous materials or unsafe working conditions at Customer's site where the Work is to be performed, Convergent is entitled to stop the Work at that site if such hazardous materials, or unsafe working conditions were not provided by or caused by Convergent. Convergent in its sole discretion shall determine when it is "safe" to return to perform the Work at Customer's site. Convergent shall have no responsibility for the discovery, presence, handling, removing or disposal of or exposure of persons to hazardous materials in any form at the Customer's site. To the fullest extent allowed by law, Customer shall indemnify and hold harmless Convergent from and against claims, damages, losses and expenses, including but not limited to, reasonable attorney's fees, arising out of or resulting from undisclosed hazardous materials or unsafe working conditions at Customer's site.

**SECTION 11. PERSONAL DATA & SECURITY**

Convergent's obligations and liabilities regarding Processing of Personal Data and information security shall be limited solely to Processing performed by Convergent's personnel. Processing by OEMs or Third Party Products are governed by any applicable OEM end user licensing agreements or terms and conditions. Customer represents and warrants that it will comply with all applicable Data Protection Laws. Although certain products delivered by Convergent may be capable of processing Biometric Information, Personal Health Information, financial information, or government identifiers ("Sensitive Information"), Customer acknowledges that Convergent is not Processing Sensitive Information (or to the extent it is Processing Sensitive Information, it is doing so strictly in accordance with Customer's instructions) and Customer is solely responsible for compliance of all such Processing with Data Protection Laws. To the fullest extent allowed by law, Customer shall indemnify, defend and hold harmless Convergent from and against all claims, demands, actions, liabilities, damages, and costs (including reasonable attorneys' fees) asserted by a third party arising out of or relating to failure to comply with applicable Data Protection Laws including but not limited to those related to Sensitive Information. Convergent's obligations and liabilities regarding information security and Processing of customer information or data, including Personal Data, are limited to Processing performed by Convergent (if any). OEM and Third Party Product information security and Processing is governed by applicable OEM end user licensing agreements or terms. "Personal Data", "Process(ing)", "Biometric Information", and "Personal Health Information" shall be interpreted in accordance with, and shall include analogous terminology as used in, applicable laws and regulations relating to data privacy, information security, data protection, data breaches, cross-border data flows, and/or the rights and obligations of persons or entities regarding personal information ("Data Protection Laws").

To the extent Convergent accesses Customer's information systems, Convergent will not be responsible or liable for losses or harms caused by following Customer's instructions, caused by Third Party Products, caused by third party or Customer-specified remote access software, or that are otherwise not due to the fault of Convergent. Customer-authorized changes to Customer information systems are at Customer's own risk and Customer acknowledges it is responsible for the overall security of its information systems.

**SECTION 12. INTELLECTUAL PROPERTY**

Convergent shall retain title and ownership of all intellectual property rights relating to the drawings, technical documentation, or other technical information ("Documentation") delivered under this Agreement. The OEMs shall retain title and ownership of all intellectual property rights relating to the Third Party Products and will grant any license and right to use in connection with the Third Party Product through the OEM's end user license agreement or other terms and conditions. Customer shall not use any Documentation supplied by Convergent for any purposes other than those directly related to this Agreement or for the use and/or maintenance of the Third Party Product.

**SECTION 13. PRICE ADJUSTMENT**

Convergent may automatically adjust the price, with five (5) days prior written notice, if based on: (a) changes by its vendors to the cost of materials or Third Party Products to be delivered and/or labor costs related to personnel responsible for performing the Work, (b) macroeconomic conditions, such as taxes, tariffs or duties, natural disasters, labor shortages/strikes, etc., (c) market conditions such as price volatility or availability limitations, or (d) other events not within Convergent's control that impact the cost of performing the Work. The adjustment shall be consistent with applicable market indexes, where available, third-party sources or other evidence. Convergent reserves the right to add periodic surcharges, including without limitation, adjustments for the then current price of fuel, such surcharges to be specified and invoiced by Convergent.

**SECTION 14. TERMINATION**

If a party materially breaches this Agreement, the other party shall provide written notice of the breach and a reasonable time to cure the breach, but in no event less than 30 days. If the breaching party fails to cure the breach within the specified time period, the non-breaching party may terminate this Agreement upon 15 days written notice to the other party. If Convergent notifies Customer of a material breach pursuant to this paragraph, Convergent may temporarily suspend its work without liability until Customer cures the breach.

**SECTION 15. GOVERNING LAW AND DISPUTES**

The parties agree that this Agreement shall be governed by the laws of the state/province where the Work is located, and venue for disputes shall be located in that state/province.

In the event of any dispute between Convergent and Customer, Convergent and Customer shall first attempt to resolve the dispute in the field, but if that is not successful, then in a meeting between authorized officers of each company. If settlement attempts are not successful, unless the dispute requires injunctive relief, then the dispute shall be decided exclusively by arbitration. Such arbitration shall be conducted in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association (if the Services are performed in the United States) or Arbitration Rules of the ADR Institute of Canada, Inc. (if the Services are performed in Canada) currently in effect by a single arbitrator and shall be a final binding resolution of the issues presented between the parties. The prevailing party shall be entitled to recover its reasonable attorneys' fees and costs. Any award by the arbitrator may be entered as a judgment in any court having jurisdiction.

**SECTION 16. MISCELLANEOUS**

The parties have required that this Agreement be written in English and have also agreed that all notices or other documents required by or contemplated in this Agreement be written in English. Les parties ont requis que cette convention soit rédigée en anglais et ont également convenu que tout avis ou autre document exigé aux termes des présentes ou découlant de l'une quelconque de ses dispositions sera préparé en anglais.

Any changes to this Agreement shall be in writing signed by both Customer and Convergent.

In the event any provision of this Agreement is held to be invalid or unenforceable, the remaining provisions of this Agreement shall remain in full force and effect.

Customer waives all claims against Convergent arising from or related to suspension of work pursuant to this Agreement.

Customer and Convergent are independent contractors, and nothing in this Agreement creates any agency, joint venture, partnership, or other form of joint enterprise, employment, or fiduciary relationship between them. Nothing contained in this Agreement shall be deemed to create a relationship of employee or employer between the parties, and neither party shall be entitled to any benefits that the other party provides for its own employees, including workers compensation and unemployment insurance. Each party shall have exclusive control over its own employees, agents, and subcontractors, its labor and employee relations, and its policies relating to wages, hours, working conditions, or other conditions.

Neither party to this Agreement shall assign this Agreement without the prior written consent of the other party hereto. Notwithstanding the foregoing, Convergent may assign this Agreement without notice or consent (i) to any of its parents, subsidiaries or affiliated companies or any entity majority owned by Convergent; or (ii) in connection with a merger, acquisition, reorganization, sale of all of the equity interests of Convergent, or a sale of all or substantially all of the assets of Convergent to which this Agreement relates.

Notices shall be in writing and addressed to the other party, in accordance with the names and addresses of the parties as shown above. All notices shall be effective upon receipt by the party to whom the notice was sent.

In no event will Convergent be obligated to comply with any project labor agreements or other collective bargaining agreements.

A waiver of the terms hereunder by one party to the other party shall not be effective unless in writing and signed by a person with authority to commit the Customer and Convergent. No waiver by Customer or Convergent shall operate as a continuous waiver, unless the written waiver specifically states that it is a continuous waiver of the terms stated in that waiver.

The Sections regarding invoicing, warranty, indemnity, limitation of liability, confidentiality and disputes shall survive the termination of this Agreement.

Convergent provides additional product safety and service information at <https://www.convergent.com/terms/> (see "IMPORTANT PRODUCT SAFETY AND SERVICE INFORMATION"), which it encourages Customer to review prior to use.





The  
*At the Heart of Community*

PARK & RECREATION DEPARTMENT

200 South Rand Road  
Lake Zurich, Illinois 60047

Phone (847) 438-5146  
Fax (847) 380-5471  
LakeZurich.org

MEMORANDUM

Date: June 16, 2025  
To: Ray Keller, Village Manager *PK*  
From: Bonnie Caputo, Recreation Director  
Re: **Key Parks Master Plan Award of Contract to Upland Design Ltd**

AGENDA ITEM

*Ed*

**Issue:**

Consideration to award a contract to Upland Design Ltd. for the preparation of the Village's Key Parks Master Plan.

The objective of the Parks Master Plan is to optimize the Village's existing key park properties while strategically planning for the future allocation of resources and potential redevelopment of these parks over the next 5 to 10 years. The FY 2025 Budget currently includes \$100,000 in funding to support the development of the Master Plan. This Master Plan will focus its attention on Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park and Zurites Park. Parks were chosen based on a variety of criteria, including public and affiliate use (Placer AI data), known infrastructure needs and Park and Recreation Advisory Board input.

The FY-2025 Budget currently includes \$100,000 in funding for the Master Plan for Key Parks.

The Village has received twelve (12) proposals for a comprehensive plan update.

**Village Strategic Plan:** This agenda items progresses the following Goal and Objective of the Strategic Plan.

- *Goal #4 – Service Sustainability: Update the Village's parks master plan for our most important open spaces, ensuring that residents of all ages, backgrounds, and abilities have the opportunity to participate in shaping the future of our green spaces.*

**Background:** The Village of Lake Zurich released a Request for Proposals (RFP) on March 3<sup>rd</sup> for the development of a master plan for key parks. The RFP was sent out to a variety of consultants and closed March 31<sup>st</sup>.

**Analysis:** The Village received twelve (12) proposals from the following firms: Baxter & Woodman, Confluence, Gary R. Weber Associates Inc., Hitchcock Design Group, Kimley-Horn and Associates Inc., Mead & Hunt, MKSK, MSA & MUSE Community + Design, Planning Resources Inc., Site, Teska Associates Inc., and Upland Design Ltd. With the exception of Gary R. Weber Associates Inc. and Mead & Hunt, all proposals included partnerships with additional consultants to handle specialized tasks such as environmental analysis, park planning, and statistically valid community surveys.

A review team consisting of representatives from Public Works, Community Development, Village Hall, and Park and Recreation, along with Shawn Bergfalk from the Park and Recreation Advisory Board, evaluated the twelve proposals. The review team evaluated the firms across several key criteria, including pricing, project timelines, dedicated staff and projected hours, staff and consultant expertise, community engagement strategies, and relevant past project experience.

After reviewing the proposals, the review team identified **Upland Design Ltd.** as a particularly strong candidate, noting their emphasis on sustainability and collaboration with Engineering Resource Associates. Upland Design Ltd. specializes in park development and renovation, as well as community-wide recreation and park planning. Their portfolio includes playgrounds, plazas, campus and pedestrian spaces, streetscapes, natural areas, and indoor-outdoor connections. They also included a dedicated park planner on their in-house team. While many responsive firms featured teams of landscape architects, urban designers, and planners, Upland Design Ltd.'s park-focused expertise set them apart.

Following a presentation from Upland Design Ltd. and successful reference checks, the review team reached a consensus to recommend their proposal to the Village Board for approval.

**Recommendation:** Staff recommends awarding the professional services agreement to develop a master plan for key parks to Upland Design Ltd. in the amount not to exceed \$98,910.

w/Attachments: Upland Design Ltd. Proposal and Agreement



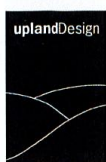
Proposal for

# Development of a Master Plan for Key Parks

Village of Lake Zurich

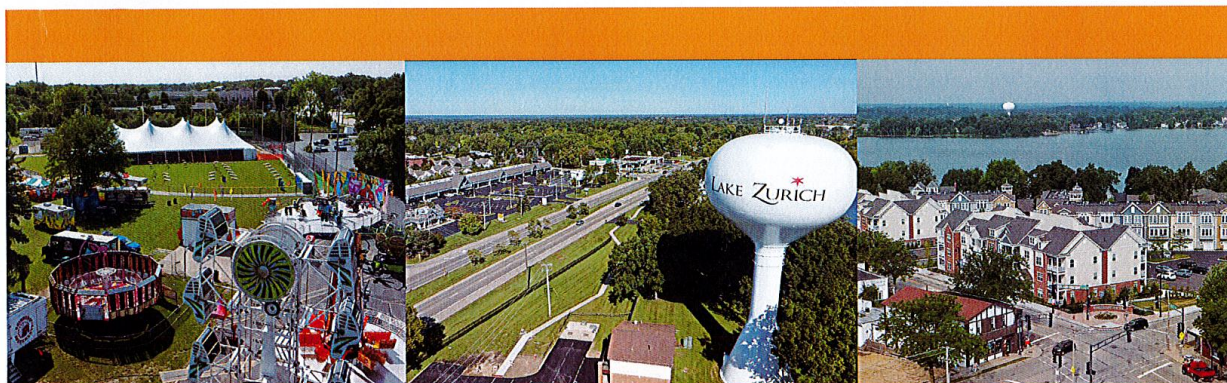
March 31, 2025

Submitted by:



**uplandDesign Ltd**

park planning and landscape architecture



## We create great outdoor spaces.

We create spaces that  
connect people outdoors.  
Places to play,  
to learn,  
to work.

Places where people want to go.  
**Go outside with us.**



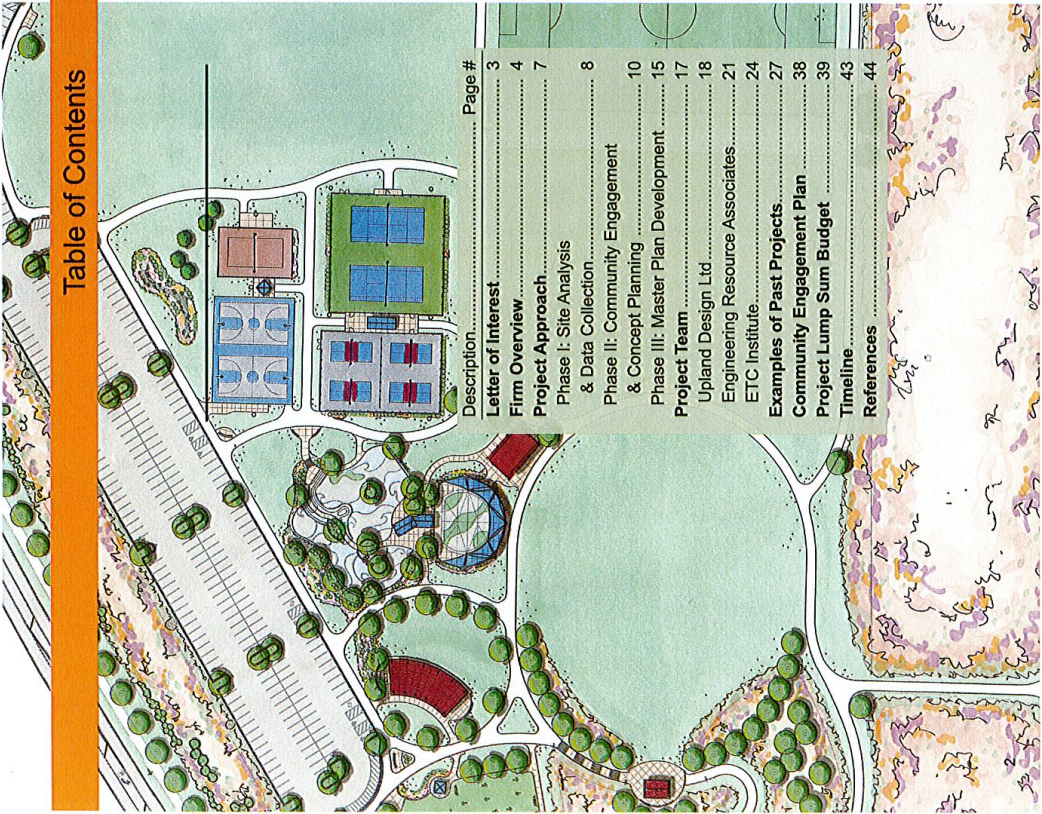


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Letter of Interest

uplandDesign

March 31, 2025

Bonnie Caputo  
Recreation Director  
Lake Zurich Village Hall  
70 East Main Street  
Lake Zurich, IL 60047

RE: Development of a Master Plan for Key Parks

Dear Bonnie,

Thank you for the opportunity to submit qualifications to assist the Village of Lake Zurich with the Master Plan development for the Kuehnemann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurltes Park. We understand that the Village is looking for significant public input to understand Village needs and align available resources for fulfillment. At Upland Design, we excel at bringing diverse needs together to create unique and imaginative park plans.

Liz Daboe and Tom Dvorak will lead the Upland Design Ltd team, and I will be the principal in charge and quality control for the project. With an in-house staff of twenty-three park and recreation professionals, Upland Design is uniquely qualified to manage your project from initial concept to plan implementation effectively and successfully. Engineering Resource Associates Inc will assist with civil engineering and sustainability while ETC Institute will provide a statistically valid communitywide survey and analysis.

Upland Design has assisted municipalities in the creation of hundreds of unique and functional park plans for over 27 years. We understand the delicate balance between design and budget while pursuing quality results in the park planning process. In addition, Upland Design will bring the following:

- A thorough understanding of the complexities and evolving trends of today's — and tomorrow's — parks and recreation market
- The most effective strategies and best practices to positively engage with community officials, staff, residents, and stakeholders to formulate a solid blueprint for the future
- A strong record of keeping projects on track
- Proven success in grant planning and writing for municipalities in Illinois

Our team is excited to create a plan that responds to your community's needs with an eye to long term sustainability. We are prepared to listen intently while bringing innovative ideas and thoughtful recommendations.

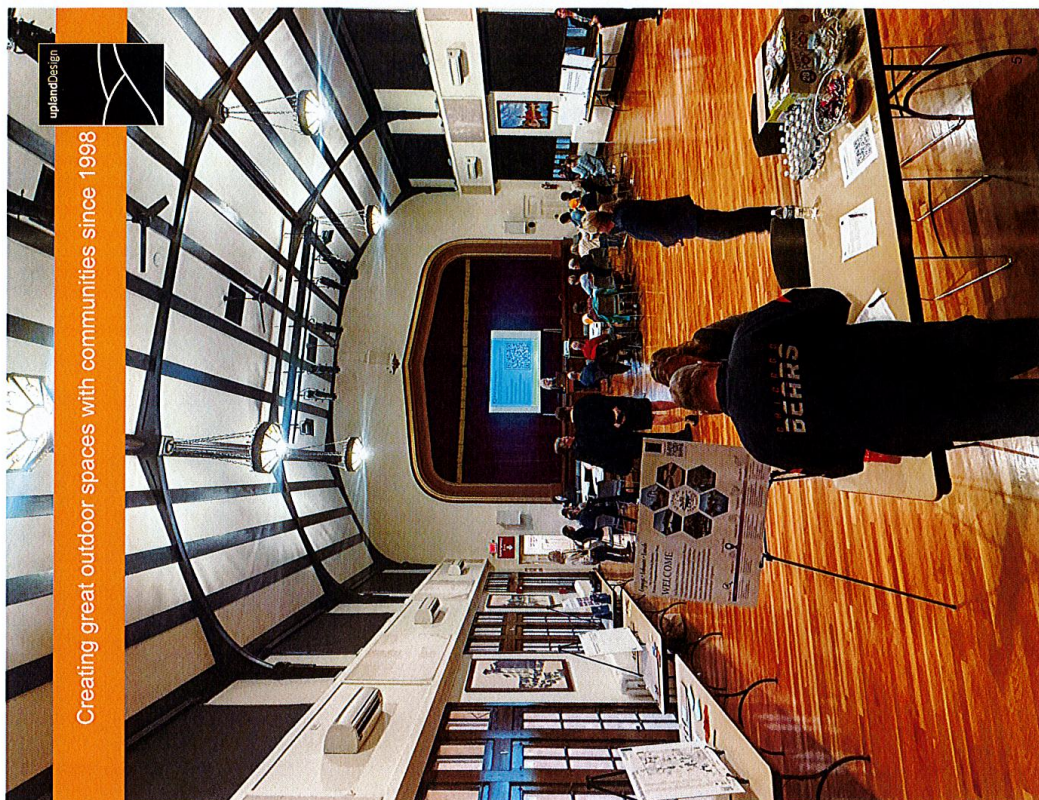
Sincerely,

*Michelle A. Kelly*

Michelle A. Kelly  
Principal Landscape Architect  
mkelly@uplandDesign.com

Chicago 312.350.4088 Upland Design Ltd  
uplandDesign.com 815.254.0091 Plainfield





Creating great outdoor spaces with communities since 1998

## Firm Overview

uplandDesign

### UPLAND DESIGN LTD Park Planning and Landscape Architecture

#### SERVICES

Comprehensive Master Planning  
Park and Playground Design to Development  
Sports Field and Sport Court Design  
State Grant Writing & Implementation  
Accessibility Improvements  
Pedestrian, Bicycle, and Multi-Use Trail Design  
Permeable Paving - Parking & Pedestrian Use  
Streetcane Design  
Signage & Wayfinding Placemaking Design  
Site Planning & Circulation  
Landscape Design  
Amphitheaters and Festival Spaces  
Bio-Swales and Rain Gardens  
Native Landscape Design

#### QUALIFICATIONS & CERTIFICATIONS

Registered Landscape Architects:  
Illinois, Iowa, Indiana, Michigan, Texas and Minnesota  
ISA Certified Arborists  
NRPFA Certified Playground Safety Inspectors  
LEED AP Staff  
Certified in Landscape Architecture with Illinois Department of Transportation Pre-Qualified  
WBE Certified

Upland Design Ltd was established in 1998 with a focus on creating great spaces for communities to **go outside**. From the beginning, our work has centered on park development and renovation, community wide recreation and park planning, playgrounds, plazas, campus spaces, pedestrian spaces, streetscapes, and natural areas along with connections to indoor spaces. With each project, we focus on how the end user will experience the places we design.

We deliver fresh ideas to community park planning with a practical approach customized for each client. Upland Design succeeds in bringing together many interests by envisioning cohesive plans that implement a solid planning process. Our team encourages staff, Board, stakeholder, and community engagement throughout the planning process to garner the best possible results. Through continual communication with clients, we ensure that goals, schedules and budgets are closely tracked, and lasting solutions obtained. Upland Design present that impact to the Village of Lake Zurich an in-depth plan for the Village's next five to ten years.

The Upland Design team is made up of over twenty-three professionals across our offices in Chicago and Plainfield. Our team includes landscape architects, horticulturalists, construction administrators, and an exceptional administrative support team. We bring a plethora of tools to each project including online surveys, virtual meetings, and a variety of software to share and publicize the final document.

#### UPLAND DESIGN LTD

Type of Organization: Corporation  
Ownership held by four team members:  
Michelle Kelly, RLA  
Heath Wright, RLA

PLAINFIELD  
24042 Lockport Street  
Suite 200  
Plainfield, IL 60544

CHICAGO  
1229 N. North Branch St.  
Suite 220A  
Chicago, IL 60642





## Project Approach

The Village of Lake Zurich owns and maintains over 247 acres of property in southwest Lake County from undeveloped natural park sites to larger active community parks. The Park and Recreation Department's strives to enrich the quality of life in the community by maximizing the value of parks and services, practicing environmental stewardship, and providing a diversity of uses and recreational opportunities for residents and visitors of all ages and abilities.

The Village is currently looking to create a Master Plan to assess, analyze, and provide a strategic framework for the improvement and development of their five Key Parks: Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurich Park. The plan's main purpose is assessing current park conditions, identifying existing needs, and developing a phased schedule of improvements over the next five to ten years with the priority of focusing on sustainability.

Upland Design Ltd proposes to assist the Village in creating this Master Plan, along with Engineering Resource Associates to advise on sustainability and stormwater as well as ETC Institute to prepare and analyze with the community-side survey. The planning process will engage residents in meaningful and diverse ways along with Village staff, key stakeholders, partners, and the Village Board to create a vision that inspires the community for the future of the five key parks. Key components of the planning process include the following six items:

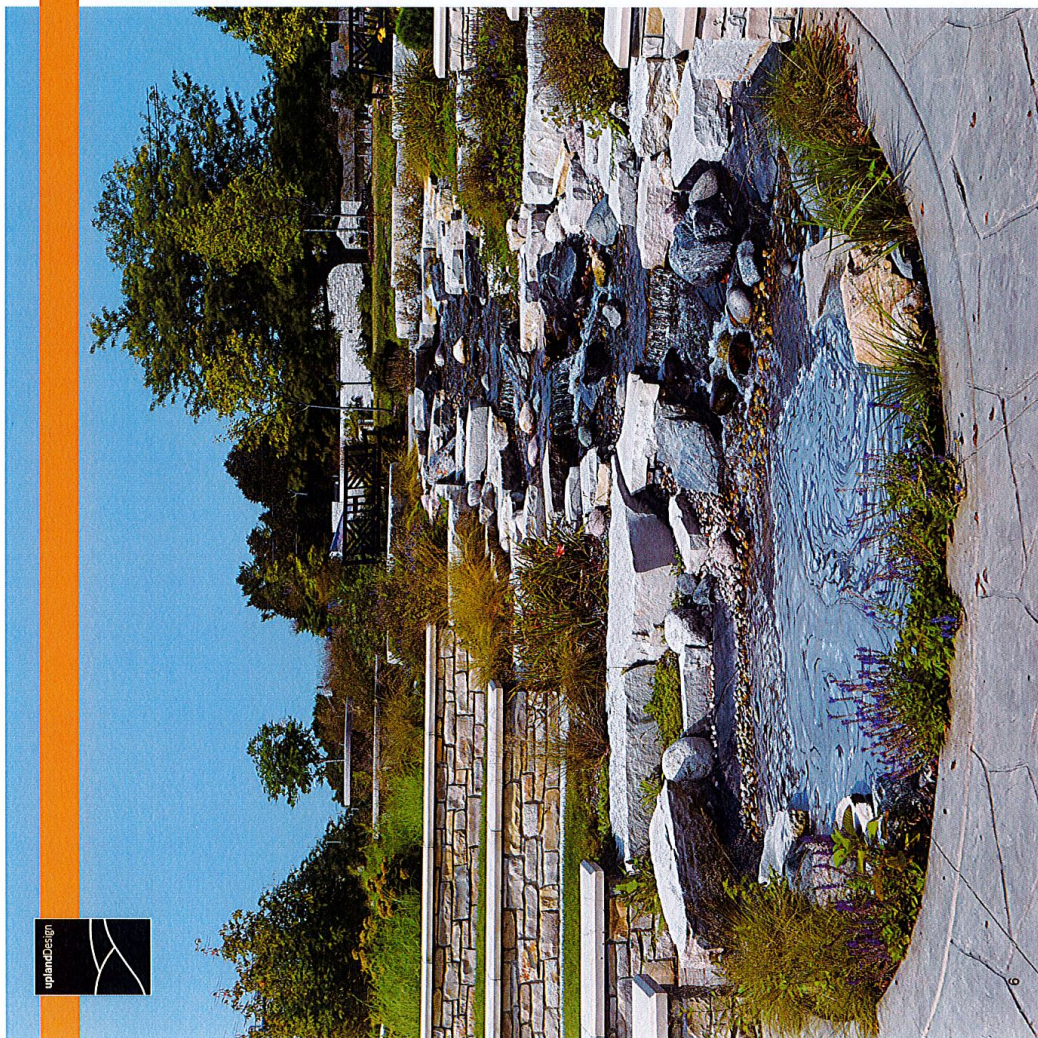
- Comprehensive Assessment
- Community Engagement
- Sustainable Design
- Phased Development
- Financial Efficiency
- Long-term Vision

Our team of park planners, landscape architects, engineers, and strategists propose a three-phase approach for the planning effort as follows:

- Phase I: Site Analysis & Data Collection
- Phase II: Community Engagement & Concept Planning
- Phase III: Final Master Plan & Adoption

Communication will be a key factor throughout the process with monthly check in meetings between Village staff and the Upland Design planning team.

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## Project Approach

### Phase I: Site Analysis & Data Collection

#### Kick Off Meeting

A meeting will be held with Village Parks and Recreation Department to kick off the project and review the planning process. The following items will be discussed:

- Project Goals and Objectives
- Confirming Roles and Responsibilities
- Project Scope and Methodology
- Public Engagement Plan and Community Stakeholders
- Timeline and Meeting Dates
- Content of Deliverables

#### Collect and Analyze Data

The Village has shared a number of documents including the 2024 Comprehensive Plan, the 2024 Equitable Use of Park Facilities Community Survey, the 2023 National Community Survey, the 2009 Open Space Master Plan, and the 2024 ADA Transition Plan. A review of any additional items that will help context will be shared. These could include but are not limited to the following:

- Existing intergovernmental agreements for the five key park sites
- Past LWCF/OSLAD grants
- Village organizational chart
- Parks and recreation annual budgets for 2024 and 2025
- Current maintenance standards

#### Inventory and Analysis of Properties

Upland Design will perform a comprehensive assessment and review of existing conditions, focusing on the five key parks identified by the Village:

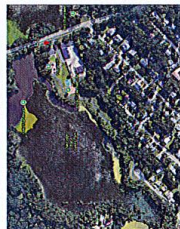
- Keuchmann Arboretum
- Oak Ridge Park
- Old Mill Grove Park
- Staples Park
- Zurries Park

Active recreational amenities including courts, fields and trails as well as support amenities such as parking lots, shade and site furniture will be assessed. Passive amenities and the landscape will be reviewed in collaboration with the environmental staff and engineers at Engineering Resources Associates in order to assess habitats, invasive species issues,

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## Project Approach

### Phase I: Site Analysis & Data Collection



and effective stormwater management. The existing trails will be visited, photos taken and condition assessed. A summary of each site will be created with base park data and inventory.

#### Base Data

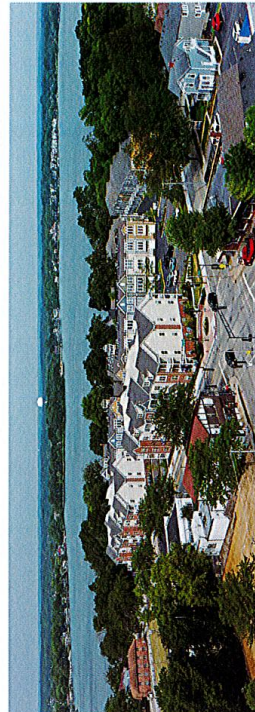
The Village will provide topographic surveys of the five key sites or GIS base data which can be prepared into AutoCAD format. Base data should include FIRM mapping as part each site along with any known wetland data. Upland will prepare the master plans using this base data so that drawings are scaled.

#### Capital Budget Parameters and Grant Planning

The Village will share the current budget process and parameters. This will include how and when non-tax funds are incorporated into overall planning. The planning team will review past capital budgets and suggest ways to incorporate grants, partnerships, and donations for future proposed improvements.

#### Prepare Site Analysis for Key Parks

The planning team will prepare one board of existing conditions for each of the five key park sites with improvements for each site. These will be shared and discussed with Village Staff. Comments and changes from this review will be used to create preliminary existing condition boards for the first public meeting.



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## Project Approach

### Phase II: Community Engagement & Concept Planning

#### Community Engagement Overview

The goal of Phase II is to provide the Village with clear and accurate insights based on residents' opinions, input from partners including representatives of the Special Recreation Association of Central Lake County, other active local organizations, community leaders, user groups, and residents who may not regularly use Village resources. An overview of the Community Engagement is found on pages 38, while below gives detail on each element of Phase II.

#### Stakeholder Interviews

Interviews will be held with members of local organizations, community leaders, major partners, elected officials, staff, and park users. These will be scheduled and held in the afternoon and evening, in person and via virtual meetings, to give attendees flexibility in scheduling interviews. The planning team will prepare questions and documents answers. Their experiences and input will be added to the analysis.

#### Statistically Valid Community Wide Survey

ETC Institute will design, administer, and summarize the results of a statistically valid community wide survey regarding resources and recreational needs expressed by the community. The data from this work will help inform the needs analysis and program for the five key park sites. In addition, the information will be able to guide the Village for future planning priorities.

### Community Wide Survey

#### Designing the Survey and Prepare the Sampling Plan

ETC Institute will meet with Village staff to develop the content of the survey by phone/video conference. The goals and objectives for the project will be discussed. To facilitate the survey design process, ETC Institute will provide sample surveys created for similar projects. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the Village. The completed survey will contain up to 300 responses and be up to 6 pages in length.

#### Administering the Survey

- ETC Institute will administer the survey by a combination of mail and online.
  - a. Mail - ETC Institute will mail the survey and a cover letter (on Village letterhead) to all the households in the Village. Postage-paid envelopes will be provided by ETC Institute for each respondent that was randomly selected and received the survey in the mail. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it online. The cover letter will be mailed in English and will have information in other languages that direct respondents to either go online or call a toll-free number to complete their survey in their preferred language. Note that the survey will only be mailed in English and can be made available online or mailed in additional languages for an additional fee. The toll-free numbers can be offered in multiple languages and will ring ETC Institute's language lines where an interviewer will complete the survey over the phone with the assistance of an interpreter – this option is offered at no additional cost.
  - b. Online - The digital survey will be offered in English and can be made available in additional languages for an additional fee. Only one survey per household will be sent or accepted.

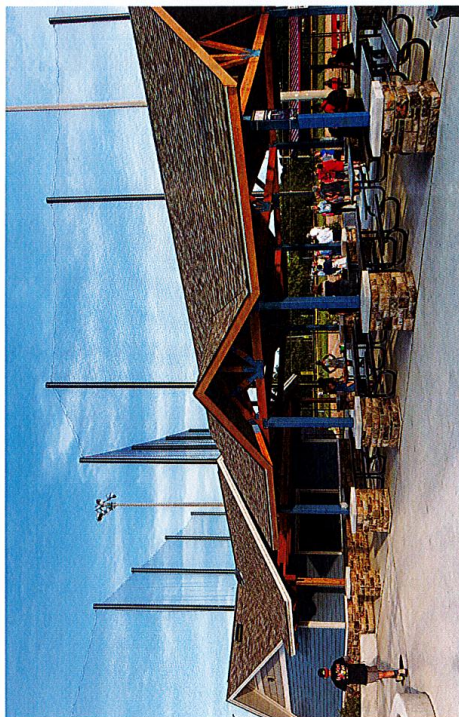
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## Project Approach

### Phase II: Community Engagement & Concept Planning

### Community Wide Survey continued

- ETC Institute will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC Institute will continue following up with households until reaching the targeted number of completed surveys.
- ETC Institute will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- All respondents who complete the survey online will be required to provide their home address when they finish the survey. ETC Institute will match addresses from respondents who complete the survey online to the addresses that were selected for the sample to ensure the participant is part of the sample. If a respondent does not provide an address or the address is not part of the sample, it will not be included.
- ETC Institute will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the Village with regard to geographic dispersion, age, gender, race/ethnicity and other factors. ETC Institute will weight the data as needed if one or more demographic groups is over/underrepresented relative to recent Census estimates for the Village's population.
- ETC Institute will provide a copy of the overall results for each question on the survey.



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## Project Approach Phase II: Community Engagement & Concept Planning

**Key Parks Needs Assessment and Recommendations**  
Upland Design will analyze input from the stakeholder interviews, the community wide survey, and the site analysis to create a list of community needs and desires along with a list of maintenance and improvements needed based on current condition of the parks as well as looking out 5 and 10 years. This analysis will allow the establishment of recommendations that align with current and possible resources while determining priorities for the changing needs of the Village.

**Review Meeting:** The planning team will meet with Village Representatives to review the assessments and recommendations for each of the key sites. The Village will give feedback and the design team will make updates to the recommendations and programs.

### Develop Preliminary Ideas

The recommendations will guide the development of idea image board for recreation, sustainability, habitat, stormwater management and overall park elements. Each board will feature color idea photos and images for site improvements, enhancements, and amenities. The boards will be submitted to the Village for review, updated and printed for the first community open house.

### First Community Open House

A community engagement event will be held to invite all residents to be part of the planning process. This meeting will include a short presentation on the planning process and an analysis of the five key parks. Input surveys along with stickers will be used to garner feedback. The Village will advertise the meeting and share it on social media. Advertisements and sign in sheets will be collected for possible future grant submittal. Attendees can then visit multiple stations to give input on items that include:

- Site Analysis Boards for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurites Park, along with an overall Village Park map
- Envision the Future at Lake Zurich with Idea Image Boards
- "Ask the Village" station - to allow residents to interact and talk with Village staff and officials

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## Project Approach Phase II: Community Engagement & Concept Planning

The open house boards will be incorporated into an online survey which can be shared on the Village website to allow those who could not attend to give input. A summary of input will be created. Sign in sheets and the meeting invite will be saved for future grant submissions.

### Prepare Park Programs

After initial public input, the planning team will write a Park Program for each of the five key parks. The Park Program gives a list of the active and passive amenities for each park along with sustainability, stormwater and natural areas improvements. These will be sent and reviewed by Village staff to ensure park elements align with the goals of the Village.

### Sustainable Design Strategy

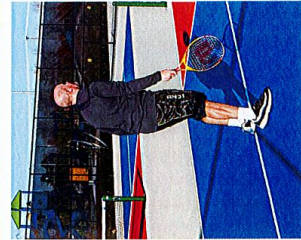
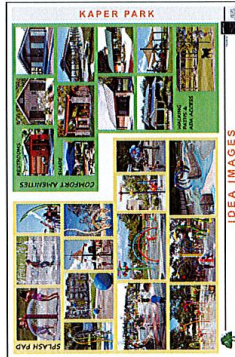
The team at Engineering Resource Associates Inc (ERA) will incorporate an inter-disciplinary approach to the design of sustainable elements for the five key parks. These include:

- **Stormwater Infrastructure:** Design or improvements necessary to protect buildings, infrastructure and environmental quality during storms.
- **Grey Infrastructure:** Sewer improvements, detention facilities, and other protocols needed to ensure that connected stormwater systems are designed and coordinated with these improvements.
- **Green Infrastructure:** Scalable solutions that feature the use of vegetation, soils and other natural processes to manage stormwater and create healthier urban environments.
- **Habitat Improvements:** Identification of invasive species areas, potential habitat improvements or new habitat areas that could enhance sites.

There is no "one size fits all" for green infrastructure projects. The project team will incorporate green infrastructure practices that will actually result in measurable stormwater runoff reduction, volume control, flood attenuation, increased water quality, and improved habitat functions, aesthetics, and values. In addition, ERA will utilize innovative planning practices to engage community members in better siting, design, and maintenance of green infrastructure in conjunction with community input.

### Concept Development

Once the Park Programs are approved, Upland will prepare one concept for each key park incorporating the approved program elements and recommendations. Initial concepts will be black and white and prepared





Project Approach  
Phase II: Community Engagement & Concept Planning



in Auto CAD. Proposed improvements including renovations, new amenities and proposed sustainability and landscape features will be shown. Color images of proposed improvements will be included on each plan. A cost estimate will be prepared using publicly bid data for local and regional park projects.

Review Meetings

The planning team will meet with Village representatives over two virtual meetings to review the concepts of the five key parks along with the detailed cost estimates. These virtual meetings will allow staff an in depth understanding of the 10 year improvement plans for the sites. Based on comments from the staff, the concepts will be adjusted, cost estimates updated, and the plans color rendered.

Second Community Open House

A second community engagement event will be held with presentation of the park programs and preliminary concepts with color images. This meeting will be completed in-person. Stakeholder interviewee and the entire community will be invited. The presentation will include a summary of the planning process, highlights of community input, and the five concept plans. The concept plans will be presented and shown on 24" x 36" boards with an updated written survey that will be made available for community input. Again, this data can be shared online to reach a wider audience. Sign in sheets and the meeting invite will be saved for future grant submissions

Recommendations for Potential Funding and Phases

A summary of internal funding, external funding, potential grant funding, and outside sources will be created. The Capital Development Projects for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zuriles Park will put into a 10 year chart, with projects highlighted with a phased approach for each site. A summary of expenditures and potential grants for each year will be included. Components will be prioritized according to community needs and then adjusted with cost estimates aligned with budget allocation and funding opportunities.

Project Approach  
Phase III: Master Plan Development

With the Phase II community engagement and concept planning complete, the project team will collate and prepare a preliminary master plan document for staff and elected officials review. Final adjustments will be made following Village comments and then the final draft will be prepared. The report will be broken out into chapters to document the planning process, community engagement, sustainable design, phased development, financial efficiency, and long-term vision for implementation.

Deliverables will include:

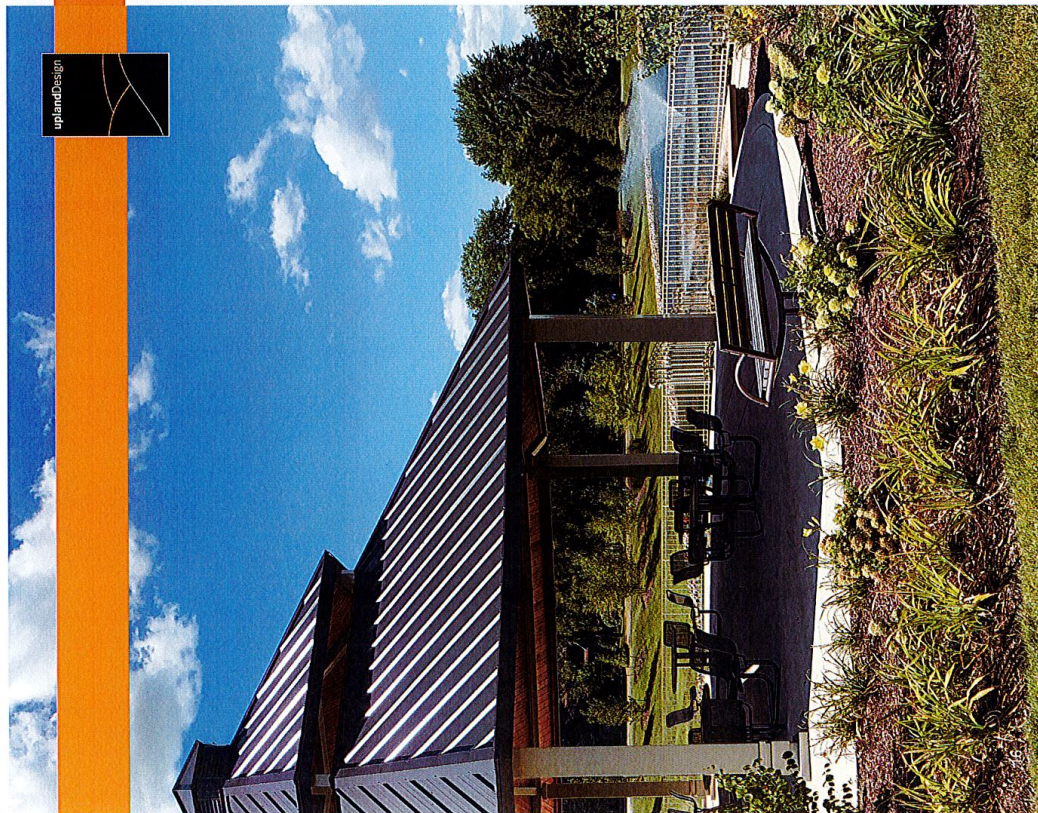
- Executive Summary with Long Term Goals
- Key Parks and Amenities Assessment and Recommendations with Key Park Improvements, including Project Priorities
- Community Engagement Summary
- Community Wide Survey Summary
- Park Program for Each Site
- Master Plans for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zuriles Park
- Cost estimates for each Master Plan
- Sustainability and Stormwater Management Strategies for each site
- 10-year Capital Plan with Cost Estimates for Five Key Parks with Alternative Funding Options
- Appendices
  - o Community-Wide Survey Overall Results and Details

Board Presentation for Adoption

The Final Master Plan will be presented to the Parks and Recreation Board and Village of Lake Zurich Board. It will include the summary of findings from the assessment and community engagement, proposed improvements with master plans, priorities, and implementation strategies including budgets, and phasing. The Village of Lake Zurich Board will have the opportunity to view the final document and adopt the plan as part of a public Board meeting. Below is a sample of how a phased plan is created for one site including grant funds with a five year plan.

Summary Cost	Phase 0 2023 - CD	Phase 1 2026	Phase 2 2027-2028 ORLAD Construction	Phase 3 2029	TOTAL COST
ANADA					
Shades Structure & Plaza	\$ 2,052,742	\$ 4,202,742			\$ 6,255,484
Shade Shelter & Seating - 24" x 44" Shelter	\$ 600,542	\$ 600,542			\$ 1,201,084
Trail Loop Path - 3.47 Miles	\$ 2,188,270	\$ 1,148,815	\$ 600,506	\$ 606,468	\$ 4,543,059
Stormwater Management	\$ 254,044	\$ 241,980	\$ 13,324	\$ 377,225	\$ 846,573
Stormwater Detention and Pollinator Garden	\$ 192,705		\$ 23,101	\$ 115,623	\$ 331,429
Game Area	\$ 528,541		\$ 810,133	\$ 861,395	\$ 2,199,069
2-12 Playground Area	\$ 528,541		\$ 810,133		\$ 1,338,674
Remnant Basketball Building	\$ 827,630		\$ 910,353		\$ 1,737,983
Remnant Enclosure	\$ 72,987				\$ 72,987
100' Concrete	\$ 1,564,488	\$ 350,000	\$ 355,844	\$ 14,154	\$ 2,324,486
AE Design Fee/Permitting		\$ 347,852.46	\$ 355,844	\$ 14,154	\$ 717,850.92
Total Per Phase	\$ 341,852	\$ 6,752,975	\$ 3,225,714	\$ 1,444,183	\$ 11,784,624
Yearly Grants		5%	10%	25%	
Potential Grant Assistance		\$ 170,926	\$ 322,571	\$ 361,046	\$ 854,543
Total Per Phase With Grant Assistance	\$ 341,852	\$ 6,752,975	\$ 3,225,714	\$ 1,444,183	\$ 12,584,759





## Project Team

The following team members will be the key contacts for the project. Firm profiles and resumes follow. Each firm has reviewed their current and expected future workload, and has determined that we have the flexibility and time needed for a strong commitment to this project.

### Team Leaders



**Michelle Kelly, PLA**  
Principal Landscape Architect - Quality Control  
Registered Professional in IL, OR, MN  
NRPA Certified Playground Safety Inspector  
Park Planning and Landscape Architecture



**Liz Daffoe, PLA**  
Team Lead  
Registered in IL, OR, MN  
NRPA Certified Playground Safety Inspector  
Park Planning and Landscape Architecture



**Tom Dvorak**  
Team Lead  
Landscape Designer  
Park Planning and Landscape Architecture



### Civil Engineering



**Erin Pando**  
Environmental Lead  
Sustainability Expert



### Community Wide Survey



**Ryan Murray**  
Assistant Director of Community Research  
Senior Project Manager - Olathe, Kansas







## Michelle A. Kelly Principal Landscape Architect in Charge

Registered Landscape Architect  
Illinois # 157-001002, Michigan # 3901001226  
Iowa # 00699 Indiana # LA21200027  
Certified Playground Safety Inspector, since 1995

Education: Bachelor of Landscape Architecture with High Honors  
University of Illinois at Urbana-Champaign, 1992



### Professional Activities:

American Society of Landscape Architects, Member Midwest Institute of Park Executives  
Landscape Architecture Alumni Advisory Board National Park and Recreation Association  
Lambda Alpha International, Ely Chapter, Member

**Experience:** Michelle has been designing parks, outdoor recreation spaces and landscapes for the past 30 years. From public meetings through design development and construction observation, she succeeds in creating great outdoor parks and recreation spaces. Her professional work includes landscape planning for park districts and municipal sites, as well as design of dynamic playgrounds, sports fields, natural areas, and community centers. She has led communities through numerous renovations with a commitment to sustainable design, efficiency and keeping the communities' interests at heart. Michelle established Upland Design in 1998. Prior to that, she worked for the Elmhurst Park District and the City of Evanston.

### Project List: Below are projects Michelle has led for Upland Design:

- Comprehensive Master Plan: Batavia Park District
- Comprehensive Master Plan: Glencoe Park District
- Comprehensive Master Plan: Park District of Oak Park
- Comprehensive Master Plan: Village of Carpentersville, Illinois
- Homer Glen Parks Master Plan: Village of Homer Glen, Illinois
- Parks Comprehensive Plan: Sandwich Park District
- Parks Master Plan, Mapping and National/State Recommendations: Oak Lawn Park District
- Parks Analysis, National/State Recommendations and Mapping: City of Mansfield, Connecticut
- Glenbriar Park Development: Butterfield Park District
- Wolf's Crossing Park Master Plan and Park Development: Naperville Park District
- Northwestern Medicine Kishwaukee Health and Wellness Center: City of DeKalb, Illinois
- Orland Park Nature Center Development: Village of Orland Park, Illinois
- Apple Orchard OSLAD: Bartlett Park District
- High Ridge Park Renovation Master Plan and OSLAD Grant: Westchester Park District
- Century Park OSLAD Development: Bolingbrook Park District
- Lincoln Park Artificial Turf Fields: Chicago Park District
- Whisper Creek Park: Mokena Community Park District
- Dellwood Park OSLAD: Lockport Park District
- Pottawatomie Park Sensory Playground: St. Charles Park District
- Hattendorf Park OSLAD Development: Elk Grove Park District
- Central Park North: Oak Brook Park District

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## Liz Dafoe Principal Landscape Architect

Registered Landscape Architect  
Illinois #157-001572  
Certified Playground Safety Inspector, since 2014  
Education: Bachelor of Landscape Architecture  
Michigan State University, 2006



### Professional Activities:

American Society of Landscape Architects, Member  
MSU Landscape Architecture Alumni Advisory Board

**Experience:** Liz has lived in Chicago for the past 19 years, and her work has centered on creating great outdoor parks and recreation spaces for communities. Her experience includes community wide park planning, park design, playgrounds and sport fields, sport courts, and artificial turf. She has completed projects from concept through construction for a variety of sites and communities, and she has coordinated with permitting agencies and governments to provide a smooth process through completion. Liz focuses strongly on keeping costs within budget and projects on schedule. She will be the main project manager coordinating in office efforts and communicating with subconsultants throughout the process.

### Project List: Below are a number of projects Liz has worked on:

- Comprehensive Master Plan: Park District of Oak Park
- Comprehensive Parks Master Plan: Village of Carpentersville, Illinois
- Parks Master Plan, Mapping and National/State Recommendations: Oak Lawn Park District
- Centennial Park: Elmhurst Park District
- Hattendorf Park OSLAD Development: Elk Grove Park District
- 2019-2022 CPS Playground Updates: Chicago Public Schools
- Hamlet Playground: Batavia Park District
- Lincoln Park Artificial Turf Fields: Chicago Park District
- Whisper Creek Park: Mokena Community Park District
- Community Park Master Plan and OSLAD: Hanover Park Park District
- Homewood Estates OSLAD: Homewood-Flossmoor Park District
- Millennium Park OSLAD: City of Elgin, Illinois
- Lawn Manor OSLAD Development: Oak Lawn Park District
- Flowers Park OSLAD: Village of Lincolnwood, Illinois
- Morrill and Leland Elementary School - Sustainable School Playgrounds: Chicago Public Schools
- Carpenter Park Master Plan and Phase 1 Development: Village of Carpentersville, Illinois
- Humbrecht Park Playground Renovation: Bartlett Park District
- Heggie Park: Joliet Park District
- Chickadee Park: Palatine Park District
- Hamilton Park: Palatine Park District
- Orland Park Nature Center Development: Village of Orland Park, Illinois

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**Tom Dvorak**  
Project Manager

Education: Bachelor of Landscape Architecture  
University of Wisconsin - Madison, 2018

Professional Activities:  
American Society of Landscape Architects, Member



**Experience:** Tom joined Upland Design Ltd upon graduation and found his niche in park and recreation design. His experience includes park master planning through construction document preparation, playground design, sports fields and courts, grant writing, and audits. He enjoys engaging with each community during the planning phase. His focus is designing exceptional recreation opportunities that cater to community needs and making sure projects follow their schedules and budgets.

**Project List:** Below are projects Tom has assisted with:

- Marshall Park: Elk Grove Park District
- Childrens Play Area: Geneva Public Library
- Clauss Park Development: Roselle Park District
- Cedar Park Playground: Palatine Park District
- Leisberg Park Site Planning: Bartlett Park District
- Schoppe Park Site Planning: Bartlett Park District
- Wellington Park Development: Geneva Park District
- Sandholm West: Geneva Park District
- Glenbriar Park Development: Butterfield Park District
- Wolf's Crossing Community Park Master Plan: Naperville Park District
- Proesel Park Playground Renovation: Village of Lincolnwood
- Dellwood Park Playground Renovation: Lockport Township Park District
- Milwaukee Alley Plaza Design: Chicago Department of Transportation
- Jaycee Park Playground Renovation: Bolingbrook Park District
- Lawn Manor Park Master Plan: Oak Lawn Park District
- Eagle Ridge Tot Lot Accessibility Ramp: Oak Lawn Park District
- Austin Park OSLAD: Morton Grove Park District
- 2022 OPS Playground Updates: Chicago Public Schools
- Thornton Park OSLAD Development: City of Ottawa
- Aux Sable Springs Community Park Master Plan and OSLAD Development: Village of Minooka
- Cambridge Crest Park Playground Renovation: Lockport Township Park District
- Mansfield Park Playground Renovation: Morton Grove Park District
- Clover Hills Park Playground Renovation: Geneva Park District

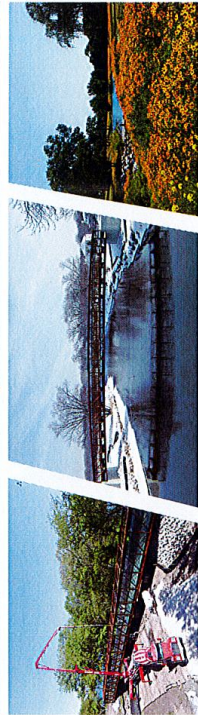
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## ENGINEERING RESOURCE ASSOCIATES

## COMPANY PROFILE



**Engineering Resource Associates, Inc. (ERA)** is a consulting firm providing civil engineering, structural engineering, environmental science and surveying services to clients throughout Illinois, Indiana, and Wisconsin. Our diverse clientele includes municipalities, park districts, forest preserves, sanitary districts, county agencies, state agencies, and private development. We have 35 years of experience identifying and working with a wide variety of local, state and federal funding sources. Our staff of professionals includes licensed engineers, structural engineers, surveyors, environmental scientists, certified floodplain managers, and CAD/GIS specialists.

Our firm specializes in providing comprehensive services throughout the planning, design and construction phases of engineering and environmental assignments. The following is a partial listing of the primary types of projects that have successfully been completed by our firm.

OFFICE LOCATIONS	
<b>Warrenville (Corporate Office)</b> 35701 West Avenue, Suite 150 Warrenville, IL 60555 Phone: (630) 393-3060	<b>Chicago</b> 10 S. Riverside Plaza Suite 875 Chicago, IL 60606 Phone: (312) 474-7841
<b>Champaign</b> 2416 Galen Drive Champaign, IL 61821 Phone: (217) 351-6268	<b>Milwaukee</b> 342 N. Water Street Suite 600 Milwaukee, WI 53202 Phone: (414) 238-9189
<b>Parks and Recreation</b> Riverwalks, Sports Complexes, Golf Courses, Regional Trails & Paths, Community Parks, Open Spaces, Dog Parks, & State Park Improvements <b>Stormwater</b> Hydrologic & Hydraulic Analyses, Master Plans, Watershed Studies, Ordinance & Guidance Manuals, Storm & Sanitary Modeling, Floodplain Mapping, Stream Restoration, Levee Certification, Civil/Site Plan Reviews, Permitting Assistance & CRS Services <b>Environmental</b> Wetland Mitigation & Enhancement, Stream Bank & Shoreline Stabilization, Best Management Practices (BMPs), Natural Area Restoration, NPDES Assistance & Grant Assistance <b>Site Development</b> Design and Rehabilitation of Municipal Facilities, Education, Healthcare, Commercial and Residential	<b>Transportation</b> Design & Rehabilitation of Roadways, Parking Facilities, Intersections, Traffic Signals, Lighting, & Streetscape <b>Municipal</b> In-House Government Agency Assistance including Plan Review, Capital Project Management, and General Assistance, Infrastructure Planning and Design <b>Construction</b> Construction Management, Bidding Assistance, Construction Layout Observation, IDOT Documentation and Construction Administration <b>Structural</b> Phase I & Phase II Engineering for Design & Rehabilitation of Highway Bridges, Culverts, Retaining Walls, Dams & NBIS Bridge Inspections <b>Surveying and Mapping</b> Topographic Surveys, Boundary Surveys, UAV & Drone Surveys, Construction Layout & Geographic Information Services (GIS) Services

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**Erin Pande, PWS, CFM**  
Environmental Lead

#### Project Experience:

**Cosley Zoo / Administration Building Parking Lot Rehabilitation and Expansion Improvements, Wheaton Park District** - Ecological Services Director for the three-phased parking lot expansion designed with several green measures such as rain gardens, bio swales and permeable brick pavers for the Wheaton Park District's Cosley Zoo. Andrew designed the overall parking lot footprint and requirements. He assisted in minimizing the parking lot footprint and created improved circulation for pedestrian traffic. ADA accessibility was improved for both lots. Andrew coordinated with the City of Wheaton and DuPage County. Cosley Zoo is an Association of Zoos & Aquariums (AZA) accredited facility.

**Green Streets / Downtown Water Quality Enhancements, Village of Downers Grove** - Project Manager for development of a program intended to improve a largely impervious business district through the use of BMPs to treat storm sewer discharges and remove pollutants from impervious surface runoff. She completed a sustainable Stormwater Program to address drainage problems through rain gardens, vegetated swales, rain barrels, and downspout disconnection in residential areas. This included design of a pilot rain garden project.

**Rattle Park Improvements, Wheaton Park District** - Project Manager for improvements in a 6.7-acre park in Wheaton, IL. Project elements include determination of sediment depths in ponds for dredging, shoreline stabilization design, structural evaluation, Best Management Practice design of bioswales, rain gardens, permeable pavers and forebays for the ponds. Project tasks included: topographic and bathymetric surveys, conceptual plan preparation, final design, permit applications, construction document preparation for competitive bidding, bidding assistance and construction observation and as-built surveying services.

**Crystal Lake Park Improvements, Urbana Park District** - Project Manager leading the design improvements for the 144-acre park which features a mature urban forest, a scenic parkway drive, Crystal Lake, the Saline branch and numerous amenities. Improvements to the lake include a lookout plaza; public kayak launch; gravel beach; flagstone outcroppings; lake perimeter invasive species removal and bank native seeding; make-up water irrigation intake, pump house and treatment pools; wetland planting. Additional OS/LAD funded park amenities ERA designed included: new pavilion; playground; concrete bags and table games; accessible path work to each; and a boat dock for rentable paddle boats/kayaks/canoes. Erin investigated the source of these pollutants and providing additional BMPs (such as bioswales, hydrodynamic structures, forebays, etc.) for removing these pollutants. Permits included USACE RWP #27, individual Water Quality permit from the IEPA, and City of Urbana.

**Hidden Lakes Trout Farm Parking Lot Reconstruction and DuPage River Greenway, Bolingbrook Park District** - Erin was the Ecological Services Director for a study of the makeup water intake from the adjacent quarry, the health of the four basins, the stormwater system connecting the four basins and outlets to the adjacent East Branch DuPage River and the adjacent park District. The study included a detailed design of the lake and river, assessment of the shoreline erosion and reviewed the water quality and sediment reports. She identified potential areas that are contributing pollutants to the system. She assisted in the environmental aspects to the conceptual plan to address incoming pollutants, existing basin health and algae issues, and erosion of shorelines and stream banks. The plan prioritized projects based upon effectiveness and cost. This plan may be utilized to apply for water quality improvement program funds for construction of the projects.



#### Education/Certifications:

- Bachelor of Arts Major Biology, Environmental Studies & Geology Augustana College - 2001
- Professional Wetland Scientist - #1327
- Certified Floodplain Manager - IL-14-00665
- Lake County Stormwater Mgmt. Certified Wetland Specialist #C-083
- Kane County Stormwater Mgmt. Qualified Wetland Review Specialist W-049
- McHenry County Certified Wetland Specialist
- Rosgen Level I: Applied Fluvial Geomorphology

#### Professional Experience:

- Engineering Resource Associates Ecological Services Director/Environmental Specialist (2004-Present)
- DuPage County Stormwater Management Division Senior Environmental Technician (2001-2004)

#### Years of Experience:

- 24 years, 21 with ERA



**Erin Pande, PWS, CFM**  
Environmental Lead

#### Oak Meadows Golf Course Preserve Master Plan and Improvements, Village of Addison/City of Wood Dale

Ecological Services Director provided environmental services to address the golf course's unique needs for water quality, wetland expansion, river restoration and stormwater management and habitat restoration. Approximately 1.5 miles of Salt Creek were restored, 24.6 acres of wetlands and 105 acres of prairie and woodland were created. Erin also designed the hydrology control system for 24 acres of wetland mitigation. After construction, the wetland area increased from 1.5 acres to 2.5 acres. In 2017 (not found in previous 4 years of studies) following the improvements and habitat has improved significantly. Mean QHEI (a composite habitat score) increased from 57.25 to 69.3, mean mIBI (a composite macroinvertebrate score) increased from 23.6 based on 2013 data to 33.2 based on 2017 data, covered largely by the appearance of these five new species, (1 new beetle species, 1 caddis fly species and 3 Diptera/fly species). Required permits included USACE, DuPage County, City of Wood Dale, Village of Addison, IDNR-OWR, IEPA, Kane SWCD and HPA. ERA helped secure \$1.2 million in EPA (IGIG funds).

#### Lake Le-Aqua-Na State Park Improvements, Illinois Capital Development Board/IDNR

Environmental Lead for State Park improvements located in Stephenson County. The project included: locating and eliminating leaks in the lakebed; dredging accumulated sediment; design of stream and wetland enhancements; repairing/replacing portions of the water control structure and dewatering sluice gate; replacing the ADA fishing pier and boat ramp; and constructing a new accessible ramp. She reviewed the sediment analysis to determine the extent of dredging of the Lake and oversaw the wetland delineation and permitting. She assisted in the design of the stream enhancements, which include backwater habitat areas, rock varies, and wetland enhancements. The project was constructed in Spring 2021.

**Enhance Grounds and Retention Ponds College of DuPage/ Illinois Capital Development Board/IDNR** - COD desired an overlook on the pond directly west of Lambert Road and improvements to the natural health of the pond southeast of the MAC building and the pond located at the northwest corner of College Ave and Park Drive. Erin oversaw the wetland delineation, reviewed the Water Quality Evaluation of Pond 2, and assisted in the design of the improvements to restore the shorelines and enhance water quality and wildlife habitat.

#### Klein Creek Master Watershed Plan and Streambank Stabilization Project, Village of Carol Stream

Ecological Services Director overseeing the development of the Klein & Thunderbird Creek Master Plan for inclusion in the Watershed Plan Addendum. The Master Plan identified streambank stabilization projects along Klein and Thunderbird Creeks along with other water quality improvement projects throughout the 12.7 square mile watershed. She developed public outreach strategies to gauge private property owner interest in the project, quantify public and private benefits, and prepare possible alternatives that allocate costs between public and private entities. Following approval of the Watershed Plan she assisted with applying for outside funding specifically Illinois Environmental Agency (IEPA) Section 319 funds. DuPage County (DuPage) and the Metropolitan Water Reclamation District of Cook County (MWRD) completed the Phase I design of the project. The project was completed in Phase II design of the project. The project reach was assessed for macro invertebrates in summer 2022. Construction of Section I was completed in 2023. ERA provided Phase II design of Section III in 2022/2023. Construction of Section III will be completed in 2024. ERA is currently designing Section II with anticipated construction during 2025.

#### Special Training:

- Freshwater Mussel Workshop: Identification and surveys using the Field Guide to the Freshwater Mussels of Chicago Wilderness
- Applied Fluvial Geomorphology, 2012
- Illinois Soil Classifiers Association - Hydric Soils, 10/2011
- Illinois Soil Classifiers Association Midwest Interim Regional Supplement for Wetland Delineation, 02/2009
- Wetland Training Institute Planning, Site Selection and Hydrology Models for Constructed Wetlands, 10/2007
- Biotic Consultants, Inc. Wetland Plant Identification 2000-2010
- Cold Climate Stormwater BMPs 11/2006
- Illinois-Hydric Soils, 08/2002
- Institute for Wetland & Env. Education & Research Corps Wetland Delineation Manual, 09/2001

#### Professional Affiliations:

- Illinois Association of Floodplain and Stormwater Management
- APWA Lake Branch, Past President
- DuPage River Salt Creek Workgroup
- Conservation Foundation
- Illinois Association of Environmental Professionals
- Society of Wetland Scientists





#### FIRM OVERVIEW

ETC Institute is recognized as the national leader in the design and administration of market research studies for local government organizations. Since 1982, ETC Institute has completed research projects for organizations in 49 states. ETC Institute has designed and administered more than 2,500 statistically valid surveys and our team of professional researchers has moderated more than 1,500 focus groups and panels and over 2,000 stakeholder interviews. ETC Institute also uses the most up-to-date and innovative analytical tools that will help the City understand and use their survey data.

#### YEARS IN BUSINESS

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#### LIST OF SERVICES TO BE PROVIDED

1. Design survey and cover letter
2. Prepare the sampling plan
3. Administer statistically valid survey
4. Analysis and reporting of statistically valid survey results
5. Presentation of final results (Optional)

#### PRIMARY CONTACT

Ryan Murray, Assistant Director of Community Research  
ETC Institute  
725 W. Frontier Circle, Olathe, KS 66061  
ryan.murray@etcinstitute.com  
(913) 254-4598  
(816) 809-7640



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#### Ryan Murray

Assistant Director of Community Research & Senior Project Manager

ETC Institute

725 W. Frontier Lane, Olathe, KS 66061

ryan.murray@etcinstitute.com

913-254-4598



#### EDUCATION

B.S., Public Administration, The University of Kansas

#### SUMMARY OF EXPERIENCE

Mr. Murray has over 19 years of experience in survey administration, development, supervision, and research analysis. Throughout his tenure at ETC Institute Mr. Murray has had the pleasure of working on survey projects that cover a wide variety of topics, including parks and recreation, community planning, customer satisfaction, transportation, employee, library, comprehensive planning, parks and recreation master plans, water and utility, and business development. His current role as Assistant Director of Community Research includes the management of the survey research team, quantitative and qualitative research, report writing, benchmarking research, survey development, statistical analysis, and the presentation of results. Mr. Murray has also held a field-supervisory role within the firm. In his previous role he planned, coordinated and supervised the administration of large scale origin-destination transportation studies on multiple projects across the country. Over the past two years, Mr. Murray has worked as a Project Manager on projects for over 500 state, county, local, and private sector clients.

#### SIMILAR PROJECT EXPERIENCE

Mr. Murray while at ETC Institute has worked on similar survey projects for the following clients:

- City of El Paso, Texas
- El Paso County, Texas
- Williamson County, Texas
- City of McAllen, Texas
- City of Corpus Christi, Texas
- City of Sugar Land, Texas
- City of San Antonio, Texas
- City of New Braunfels, Texas
- City of Cedar Park, Texas
- City of Cedar Hill, Texas
- City of Schertz, Texas
- City of Round Rock, Texas
- City of Dripping Springs, Texas
- City of Seguin, Texas
- City of College Station, Texas
- City of Amarillo, Texas
- City of Dallas, Texas
- Dallas County, Texas
- City of Fort Worth, Texas
- City of Austin, Texas
- City of Tyler, Texas
- City of Burleson, Texas
- City of Robinson, Texas
- City of Mesquite, Texas
- City of Missouri City, Texas

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## Examples of Past Projects

- Marshall Park Master Plan & Development | Elk Grove Park District
- Central Park Master Plan & Development | Oak Brook Park District
- Aux Sable Springs Park Master Plan & OSLAD Grant | Village of Minooka
- Wolf's Crossing Community Park Master Plan & Development | Naperville Park District
- Glenbriar Park Master Plan & Development | Butterfield Park District







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**Upland Design Ltd**  
815.254.0091  
uplanddesign.com  
Chicago | Plainfield

**LOCATION**  
Elk Grove, Illinois

**SERVICES**  
Project Lead

**BUDGET**  
\$2,193,376

**TIMELINE**  
2022-2024

**CONTACT**  
Ben Cuno, Director  
Elk Grove Park District  
bcuno@elkgroveparks.org  
847.437.9494

**MARSHALL PARK MASTER PLAN & DEVELOPMENT**  
ELK GROVE PARK DISTRICT

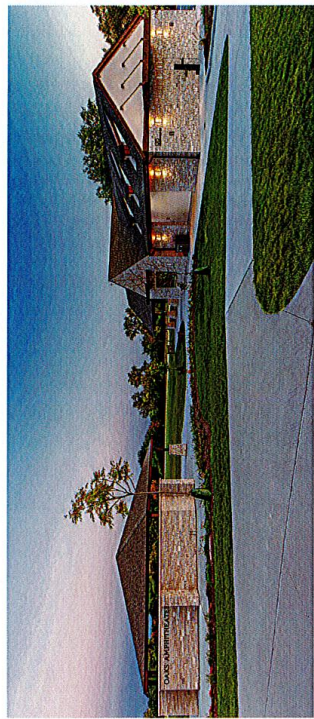
Upland Design worked with the Elk Grove Park District to create a Master Plan for the redevelopment of Marshall Park. The project included a successful IDNR Open Space Land Acquisition and Development Grant in the amount of \$400,000. Project components included the following items:

- Shelter with Restrooms
- Basketball Court
- Fitness Stations
- Natural Lawn Soccer Field with Irrigation
- Rain Garden
- and Interpretive Signage
- Community Playground
- Splash Pad
- Site Furniture including Benches and Tables

Construction documents, bidding, permitting and contract administration were all provided with the leadership of Upland Design. The park opened in the summer of 2024. Phase II is underway with the addition of new pickleball courts.

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## CENTRAL PARK MASTER PLAN & DEVELOPMENT OAK BROOK PARK DISTRICT



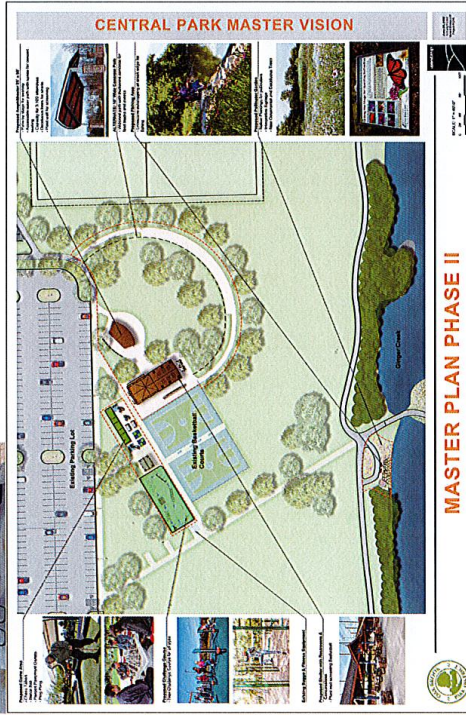
Upland Design Ltd  
1111 North LaSalle Avenue  
Chicago, IL 60610  
uplanddesign.com

**LOCATION**  
Oak Brook, Illinois  
**SERVICES**  
Project Lead  
\$2,400,000  
**BUDGET**  
2022-2024  
**TIMELINE**  
Bob Johnson  
Deputy Director  
Oak Brook Park District  
bjohnson@obparks.org  
630.390.4233  
**CONTACT**




Upland Design has assisted the Oak Brook Park District with expansion of recreational features at Central Park, their flagship park, for the past five years. This most recent phase completed in summer of 2024 includes a new community amphitheater for the park. Community input guided the addition of amenities to this 105-acre park. The project includes new recreational features to engage both youth and seniors with a challenge course and a game area. These complement the earlier phase components, including basketball and soccer fields. Upland wrote an IDNR Open Spaces Land Development and Acquisition (OSLAD) grant for \$600,000 and an Illinois DCEO Tourism Grant for \$460,000 to assist in funding the project. Components included the following items:

- Community Shelter
- Amphitheater
- Game Area
- Ninja Challenge Course
- Ginger Creek Fishing Area
- Observation-Interpretive Signage
- Ring Pong
- Bocce Ball Court
- Painted Games
- Game Tables
- Pathway Renovations and Extensions for New Amenities
- Native Landscaping and Shade Trees



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312.468.4686  
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**AUX SABLE SPRINGS PARK MASTER PLAN & OSLAD GRANT: Phase I and Phase II**  
VILLAGE OF MINOOKA WITH KENDALL CO FOREST PRESERVE

**LOCATION**  
Minooka, Illinois


**SERVICES**  
Project Lead

**BUDGET**  
\$2,100,000


**TIMELINE**  
2020

**KEY PERSONNEL**  
Liz Dufosse, Tom Dvorak  
Michelle Kelly, Heath Wright


**CONTACT**  
Dan Duffy  
Village Manager  
dan.duffy@minooka.com  
815-467-2151



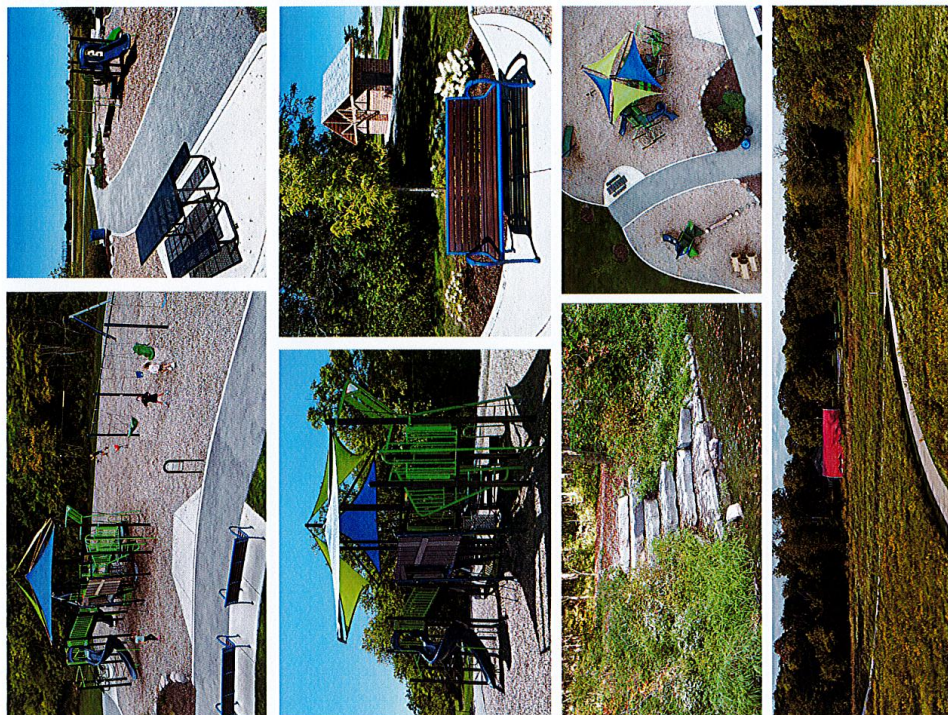
**MASTER PLAN**



**AUX SABLE SPRINGS COMMUNITY PARK**



**DESCRIPTION:** In 2018, Upland Design and Engineering Resources Associates began a master planning process for an open space site along the Aux Sable Creek. The Village of Minooka and Kendall County Forest Preserve had jointly purchased the natural areas along the creek and woodlands while the Village solely owned the farm land. The team implemented a public input process to gather feedback on project amenities and enhancements inviting the public to public open house meetings with written surveys. The plan was developed with the Village Park Committee weighing in at various stages until the final plan was adopted. Upland then wrote an OSLAD grant which was awarded. Phase I was completed in 2020 and the Village started planning for future phases immediately with the addition of restroom in 2023. A second OSLAD grant was written in 2024 and awarded. The second OSLAD phase is under construction currently with new amenities. Components include a canoe launch, two parking lots, asphalt and crushed stone trails, a playground, playground, splash pad, pavilions, sand volleyball court, picnic shelters, three ball fields, a soccer field and a lacrosse field.







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## WOLF'S CROSSING COMMUNITY PARK MASTER PLAN & DEVELOPMENT NAPERVILLE PARK DISTRICT

Upland Design collaborated with the Naperville Park District to create a master plan for a new 33-acre community park. We led two public meetings and two focus group meetings to gather input from key stakeholders and the general public. The project included procuring an IDNR Open Space Land Acquisition and Development Grant in the amount of \$400,000. The final plan met the goals and budget, and the team began construction documents including the following elements:

- Community Playground
- Community Picnic Shelter
- Recirculating Splash Pad
- Restroom Building & Storage Building
- Baseball Field
- Multi Purpose Fields
- Basketball Courts
- Pickleball Courts
- Tennis Courts
- Paved Walking Loop
- Challenge Course
- Fitness Stations
- Sled Hill
- Warming Shelter
- Rain Gardens
- Outdoor Classroom
- Parking Lots

A strong focus of the project is the use of rain gardens and native plantings, creating an active park surrounding by nature. The rain gardens are a mix of native plants and stone, creating infiltration areas. The project construction finished in 2020.



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616.460.0101  
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LOCATION  
SERVICES  
BUDGET  
TIMELINE  
CONTACT



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1111 North Dearborn Street  
Chicago | Plainfield

**GLENBRIAR PARK  
MASTER PLAN & DEVELOPMENT  
BUTTERFIELD PARK DISTRICT**

**LOCATION**  
Lombard, Illinois

**SERVICES**  
Project Lead

**BUDGET**  
\$1,250,000

**TIMELINE**  
2019-2020

**CONTACT**  
Michael Hixenbaugh  
Executive Director  
mhixenbaugh@butterfieldpd.com  
630.888.2229 X12

Upland Design assisted the Butterfield Park District with the development of Phase I & II of the master plan for Glenbriar Park. The project included procuring an IDNR Open Space Land Acquisition and Development Grant in the amount of \$400,000 and a DCEO grant. Working with the community and District staff, Upland prepared this concept incorporating community needs. Upland also prepared construction, permit and bid documents and undertook construction administration for this wonderful park expansion.

The following elements were included:

- Enhanced Landscaping
- Drinking Fountain with Dog Bowl
- Pollinator Garden
- Soft Surface at Challenge Course
- Fountain & Landscape Plantings
- Accessible Restrooms
- Outdoor Amphitheater Seating
- Main Shelter & Performance Area
- Trail Connection
- Pickleball & Tennis Courts
- Digital Stone Sign

A second phase with a new OSLAD grant for \$600,000 is currently under construction adding courts, play and parking.




**Glen Briar Park  
Phase II Master Plan**  
Butterfield Park District

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Meeting - PACKET - (Page 55 of 145)

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General Attachment: 6d.pdf (Page 21 of 39)



## Community Engagement Plan



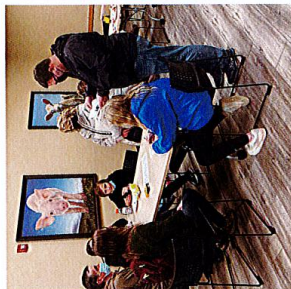
**Community Engagement Process:** Throughout the master planning process, community engagement will be integral to the success of the master plan. Below is an in depth look at key elements of the engagement process.

**Public Information:** At key stages of the planning process, the Village will share information on social media and share with local news media. Information about the park master planning process. The releases will share information such as, initial of the process, dates for the community survey to be mailed, public engagement meetings, as well as adoption of the master plan.

**Stakeholder Interviews:** Interviews will be held to gather ideas from key community stakeholders such as sport affiliates, volunteer groups, Foundation representatives, and nearby neighborhood groups. The final list of attendees will be discussed with the Village and planning team to identify groups and individuals with knowledge of community needs. Scheduled in the afternoon or evenings, the interviews will be informal discussions to gather initial thoughts and ideas ahead of the concept design and public meetings.

**Public Invitations for the First and Second Open House:** Public invitations will be prepared in digital format by the planning team, and released for first community engagement meeting via newspaper article, social media, and email blast by the Village. Previous meeting or interview attendees will also receive an email invite.

**Website Information:** The Village will keep a link on the Village web page for information about the planning process. The design team will prepare items to be included as the process unfolds including online surveys for the first and second open house meetings.



COST BY TASK AND TITLE FORM BY UPLAND DESIGN LTD											
Development of a Master Plan for Five Key Parks											
Village of Lake Zurich											
Upland Design Ltd											
ERA											
Community											
Total											
Hourly Rate											
Phase	Principal Architect	Project Manager	Landscaping	Design	Doc	Technical	Environmental	Community	Hours	Total	Cost
1.00 Phase I - Site Analysis and Data Collection	3	3	3	3	3	3	3	3	6	33.6	33.6
Kick-Off Meeting	3.5	3.5	3.5	3.5	3.5	3.5	3.5	3.5	33.6	33.6	33.6
Collect and Analyze Data & Visit Five Key Sites	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	32	32	32
Site Analysis Board Preparation	1	1	1	1	1	1	1	1	15	15	15
Site Analysis Board Preparation	1	1	1	1	1	1	1	1	15	15	15
Capitol Budget and Grant Planning	2	2	2	2	2	2	2	2	3	3	3
Site Analysis Board Preparation	1	1	1	1	1	1	1	1	15	15	15
2.00 Phase II - Community Engagement and Concept Planning	2	2	2	2	2	2	2	2	20	20	20
Key Stakeholder Interviews	4	4	4	4	4	4	4	4	4	4	4
Community Wide Survey - ETC	3	3	3	3	3	3	3	3	17	17	17
Key Parks Needs Assessment & Recommendations	6	6	6	6	6	6	6	6	18	18	18
Develop Preliminary Ideas Boards	1	1	1	1	1	1	1	1	6	6	6
Review Meeting	2	2	2	2	2	2	2	2	12	12	12
First Community Open House & Prep	4	4	4	4	4	4	4	4	16	16	16
Prepare Park Programs	4	4	4	4	4	4	4	4	16	16	16
Concept Development & Cost Estimates	8	8	8	8	8	8	8	8	64	64	64
Review Meetings	8	8	8	8	8	8	8	8	64	64	64
Second Community Open House & Survey Prep	4	4	4	4	4	4	4	4	16	16	16
Sustainable Design - ERF	4	4	4	4	4	4	4	4	16	16	16
Recommendations for Potential Funding and Phases	2	2	2	2	2	2	2	2	12	12	12
3.00 Phase III - Final Master Plan and Adoption	4	4	4	4	4	4	4	4	22	22	22
Preparation of Final Master Plans	4	4	4	4	4	4	4	4	22	22	22
Board Presentation	3	3	3	3	3	3	3	3	9	9	9
Hour SUB-TOTAL	4	4	4	4	4	4	4	4	28	28	28
COST SUB-TOTAL	1,032	1,032	1,032	1,032	1,032	1,032	1,032	1,032	5,020	5,020	5,020
5.00 Reimbursables											
Message, Tolls, Postage, Delivery and Printing											
TOTAL	15,738	22,374	32,480	1,515	10,928	13,000	13,000	13,000	13,000	13,000	13,000
Upland Design Ltd											
ETC											
Total	15,738	22,374	32,480	1,515	10,928	13,000	13,000	13,000	13,000	13,000	13,000

## Project Lump Sum Budget

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Hourly Rates & Reimbursables

**Hourly Rates**  
Additional work - additional meetings, site visits, changes to work or additional work items - may be added by request at the professional service rates listed herein. No additional fee shall be charged without prior written authorization from the Village.

**Reimbursable Costs**  
Firm will bill direct non-payroll expenses at cost plus 0%. Examples of expenses include copies, plotting and printing of drawings, boards, plans and handouts, postage, delivery and tolls. Mileage will be billed at current IRS rates.

**uplandDesign Ltd**  
Landscape Architecture & Park Planning

Principal Landscape Architect	\$ 258.00
Project Manager/Sr. Landscape Architect	\$ 198.00
Landscape Architect	\$ 171.00
Landscape Designer II	\$ 160.00
Landscape Designer	\$ 152.00
Construction Administrator	\$ 101.00
Administration or Document Technician	\$ 78.00
Intern	



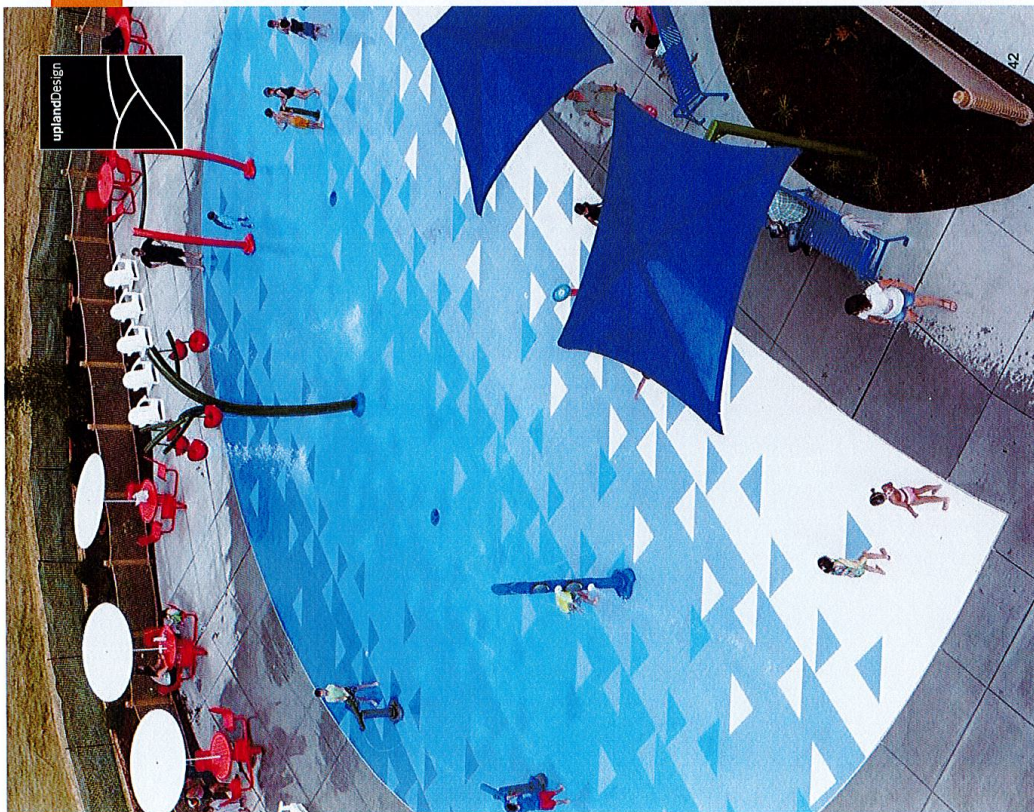
Principal	\$ 221.71
Project Manager	\$ 169.23
Assistant Project Manager	\$ 104.84
Researcher	\$ 80.44
Support Staff	\$ 67.85

Hourly Rates & Reimbursables



Staff Category	Effective Date	Hourly Billing Rate
Professional Engineer VI	4/1/24	270.00
Professional Engineer V	4/1/24	235.00
Professional Engineer IV	4/1/24	206.00
Professional Engineer III	4/1/24	177.00
Professional Engineer II	4/1/24	159.00
Professional Engineer I	4/1/24	131.00
Structural Engineer IV	4/1/24	229.00
Structural Engineer III	4/1/24	210.00
Staff Engineer III	4/1/24	143.00
Staff Engineer II	4/1/24	113.00
Staff Engineer I	4/1/24	110.00
Engineering Technician VI	4/1/24	164.00
Engineering Technician V	4/1/24	144.00
Engineering Technician IV	4/1/24	120.00
Engineering Technician III	4/1/24	105.00
Engineering Technician II	4/1/24	81.00
Engineering Technician I	4/1/24	60.00
Engineering Intern III	4/1/24	84.00
Engineering Intern II	4/1/24	63.00
Engineering Intern I	4/1/24	54.00
Ecological Services Director	4/1/24	186.00
Environmental Specialist IV	4/1/24	186.00
Environmental Specialist II	4/1/24	113.00
Environmental Specialist I	4/1/24	96.00
Professional Surveyor II	4/1/24	192.00
Professional Surveyor I	4/1/24	162.00
Surveyor IV	4/1/24	147.00
Surveyor III	4/1/24	129.00
Surveyor II	4/1/24	96.00
Administrative Director	4/1/24	172.00
Administrative Staff IV	4/1/24	137.00
Administrative Staff III	4/1/24	110.00
Administrative Staff II	4/1/24	89.00
Administrative Staff I	4/1/24	69.00





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## Project Timeline

The base scope timeline is planned for ten months. Below is a proposed schedule which will be revised with Village input to adjust for their internal schedules.

### Phase I: Data Inventory & Analysis

One Month

Begin May 5, 2025

Complete June 4, 2025

### Phase II: Community Engagement and Concept Planning

Six (6) Months

Begin June 7, 2025

Complete December 6, 2026

### Phase III: Master Plan Development

Six (6) Weeks

Begin December 7, 2026

Complete: January 20, 2027

The project team will work with Village staff to create a schedule of standing monthly meetings with best dates to attend Board Meetings and schedule public meetings.





**Reference #1**

**Client Name:** Naperville Park District  
**Contact:** Michael Piszynski  
**Address:** 320 Jackson Avenue, Naperville, IL 60540  
**Telephone Number | Email:** 630.848.5012 | mpiszynski@napervilleparks.org  
**Project Experience:** Grant Writing, Public Engagement, Park Renovations, Comprehensive Master Plan  
**Project Location:** Flossmoor, Illinois

**Reference #2**

**Client Name:** Oak Lawn Park District  
**Contact:** Ryan Gory - Superintendent of Parks and Planning  
**Address:** 9400 South Kenton Avenue, Oak Lawn, IL 60453  
**Telephone Number | Email:** 708.857.2225 | rgory@oakparks.com  
**Project Experience:** Master Planning, Grant Writing, Public Engagement, Phasing, and Development  
**Project Location:** Oak Lawn, Illinois

**Reference #3**

**Client Name:** St. Charles Park District  
**Contact:** Holly Cabel - Director of Parks and Recreation  
**Address:** 8 North Avenue, St. Charles, IL 60174  
**Telephone Number | Email:** 630.513.4333 | hcabel@stbarks.org  
**Project Experience:** Master Planning, Grant Writing, Public Engagement, Phasing, and Development  
**Project Location:** St. Charles, Illinois

**Reference #4**

**Client Name:** Butterfield Park District  
**Contact:** Michael Hixenbaugh - Executive Director  
**Address:** 21W730 Butterfield Road, Lombard, IL 60148  
**Telephone Number | Email:** 630.858.2229 | mhixenbaugh@butterfieldpd.com  
**Project Experience:** Master Planning, Grant Writing, Public Engagement, Phasing, and Development  
**Project Location:** Lombard, Illinois

**Reference #1**

**Client Name:** Wheaton Park District  
**Contact:** Rob Sperl, Director of Planning  
**Address:** 1000 Manchester Road, Wheaton, IL 60187  
**Telephone Number | Email:** 630.510.4976 | rsperl@wheatonparks.org  
**Project Experience:** Phase I, II, and III Engineering  
**Project Location:** Rathle Park - Wheaton, Illinois

**Reference #2**

**Client Name:** Village of Carol Stream, Illinois  
**Contact:** Greg Ullrich, Village Engineer  
**Address:** 500 North Gary Avenue, Carol Stream, IL 60188  
**Telephone Number | Email:** 630.868.2264 | gullrich@carolstream.org  
**Project Experience:** Phase I, II, and III Engineering  
**Project Location:** Klein Creek Streambank Stabilization Project - Carol Stream, Illinois

**Reference #3**

**Client Name:** Urbana Park District  
**Contact:** Andy Rousseau, Project Manager  
**Address:** 1011 E Kerr Ave., Urbana, IL 61802  
**Telephone Number | Email:** 217.344.9583 x205 | ajrousseau@urbanaparks.org  
**Project Experience:** Phase I, II, and III Engineering  
**Project Location:** Crystal Lake Park Improvements - Urbana, Illinois

**Reference #4**

**Client Name:** Village of Downers Grove, Illinois  
**Contact:** Julie Lomax, PE, CFM, Stormwater Administrator  
**Address:** 5101 Walnut Avenue, Downers Grove, IL 60515  
**Telephone Number | Email:** 630.493.8821 | jlomax@downers.us  
**Project Experience:** Green Infrastructure Study  
**Project Location:** Green Streets - Downers Grove, Illinois



## Professional References ETC Institute

go outside

### Reference #1

**Client Name:** Village of Mount Prospect, Illinois  
**Contact:** Michael Cassidy, Village Manager  
**Address:** 50 S. Emerson Street, Mt. Prospect, IL 60056  
**Telephone Number | Email:** 847.392.6000 | mcassidy@mountprospect.org  
**Project Experience:** Community-wide Survey  
**Project Location:** Mount Prospect, Illinois

### Reference #2

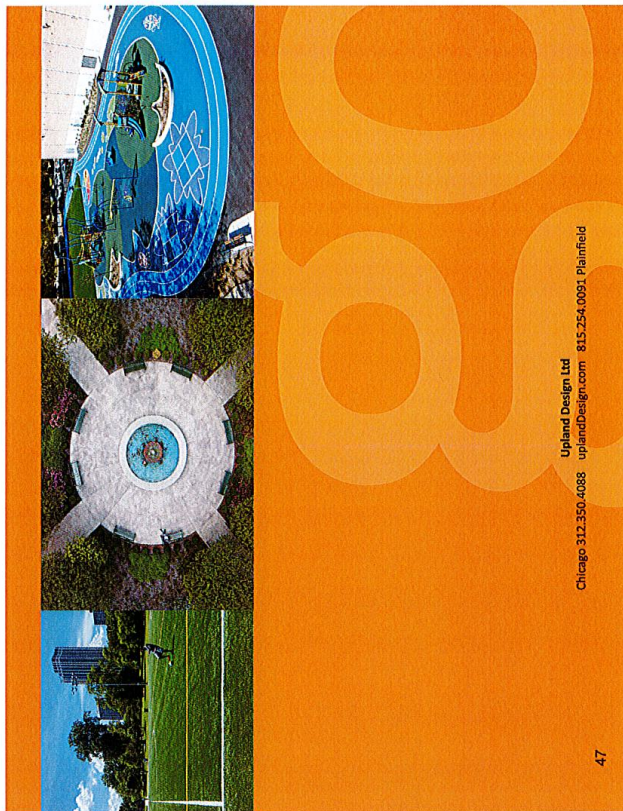
**Client Name:** Village of Oswego, Illinois  
**Contact:** Dan Di Santo, Village Administrator  
**Address:** 100 Parkers Mill Place, Oswego, IL 60543  
**Telephone Number | Email:** 847.551.2360 | ddsanto@oswegoil.org  
**Project Experience:** Community-wide Survey  
**Project Location:** Oswego, Illinois

### Reference #3

**Client Name:** Village of Glencoe, Illinois  
**Contact:** Sammy Hanzel, Communications Manager  
**Address:** 675 Village Court #1609, Glencoe, IL 60022  
**Telephone Number | Email:** 847.461.1104 | shanzel@villageofglencoe.org  
**Project Experience:** Community-wide Survey  
**Project Location:** Glencoe, Illinois

### Reference #4

**Client Name:** City of Lake Forest, Illinois  
**Contact:** A. George Issakoo, Asst. City Manager  
**Address:** 220 E. Deerpath Road, Lake Forest, IL 60045  
**Telephone Number | Email:** 847.810.3680 | issakoo@citylakeforest.com  
**Project Experience:** Community-wide Survey  
**Project Location:** Lake Forest, Illinois



Upland Design Ltd  
 Chicago 312.350.4088  
 uplanddesign.com 815.254.0091 Plainfield

**AGREEMENT BETWEEN CLIENT and FIRM  
FOR PROFESSIONAL SERVICES  
MASTER PLAN FOR KEY PARKS-VILLAGE OF LAKE ZURICH**

**Village of Lake Zurich**  
70 East Main Street  
Lake Zurich, IL 60047  
Phone: 847-540-1696.....

The Client

And

**Upland Design Ltd.**  
24042 Lockport St.  
Plainfield, IL 60544.....  
Phone: 815-254-0091

The Firm

Client and Firm agree as set forth below:

**1. Firm's Basic Services**

The Firm agrees to provide its professional services in accordance with generally accepted standards of its profession. The Firm agrees to put forth reasonable efforts to comply with codes, laws and regulations in effect as of the date of this contract. **See Attachment A for description of Professional Services.**

**2. Excluded Services**

Scope of services set forth in Attachment A is included in this agreement. Excluded services include but are not limited the following: Hydrologic/hydraulic modeling the floodplain/floodway, engineering of any kind, wetland mitigation, archeological services, environmental testing, engineering, subsurface conditions and material testing, boundary survey, topographic survey, soil borings, construction layout; construction scheduling; construction work; work-site safety, labor negotiations, permit fees, meetings, tree survey, tree preservation plans, irrigation plans or court appearances as part of these services.

Hazardous Materials: The scope of the Firm's services for this Agreement does not include any responsibility for detection, remediation, accidental release, or services relating to waste, oil, asbestos, lead, or other hazardous materials, as defined by Federal, State, and local laws or regulations.

**3. Construction Phase Services**

The Firm shall have the authority to act on behalf of the Owner only to the extent provided in this Agreement. The Firm shall not have control over, charge of, or responsibility for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the construction work, nor shall the Firm be responsible for the Contractor's failure to perform the construction work in accordance with the requirements of the Contract Documents.

**4. Firm's Insurance**

Firm carries a minimum of the following insurance:

General Liability: \$1,000,000 each occurrence	\$2,000,000 general aggregate
Automobile Liability: \$1,000,000	Umbrella Liability: \$2,000,000
Worker's Compensation: \$500,000	Professional Liability: \$2,000,000.

**5. Client Responsibilities**

The Client has designated Bonnie Caputo, Recreation Director as the contact person for this project. The Firm will direct correspondence and information to the contact person. The Client will provide pertinent information to the Firm in a timely manner so as not to hinder or delay the Firm performing their work in a timely and cost-effective manner throughout the project. The Client agrees to provide Firm with existing base information for the site and will assist the Firm with obtaining other information as requested. The Firm will rely on this information, without liability, on the accuracy and completeness of information provided by the Client. The Client agrees to advise Firm of any known or suspected contaminants at the Project Site and the Client shall be solely responsible for all subsurface soil conditions.

**6. Project Schedule**

The Firm shall render its services as expeditiously as is consistent with professional skill and care. During the course of the Project, anticipated and unanticipated events may impact any Project schedule. The Firm will attempt to make the Client aware of events that will impact the Project schedule.

**7. Compensation and Payments**

The Client shall pay to the firm the following lump sum of \$98,910 for the work described herein for both Upland Design Ltd, Engineering Resources Associates, and ETC Institute. Invoices will be structured for work completed and shall be due within 30 days of submittal to the Client. See Attachment B for fee detail.

Reimbursable Expenses: Firm will bill direct non-payroll expenses at cost plus 0%. Examples of expenses include printing, boards, plans and handouts, postage, delivery, mileage, and tolls. Mileage will be billed at current IRS rates.

**2025 Hourly Billing Rates**

Principal Landscape Architect	\$ 258.00
Project Manager/Sr. LA	\$ 198.00
Landscape Architect	\$ 171.00
Landscape Designer II	\$ 160.00
Landscape Designer	\$ 152.00
Construction Administrator	\$ 152.00
Admin or Document Technician	\$ 101.00
Intern	\$ 78.00

No additional work shall be added to the contract without authorization from the Client.

**8. Suspension or Termination of Services**

If the Client in good faith determines that the Firm prosecutes or fails to prosecute its work in such manner as to hinder or delay the completion of the project, the Client may serve written notice to the Firm setting forth any complaint about Firm's performance of its work. The Firm shall have seven (7) days from receipt of such written notice in which to take corrective action. If the Firm fails to take appropriate corrective action within said seven (7) day period, the Client may exercise the following remedies:

- a. Terminate the Firm's services by a written notice effective on the date such written notice is served on the Firm; and,
- b. Order the remaining necessary work be done by another Firm, if desired.
- c. If the Client in good faith exercises the above remedies, Client shall be responsible to pay the Firm only for the work performed prior to termination of the contract. The above remedies shall be Client's sole and exclusive remedies in the event the Client terminates the Firm's services under this provision.
- d. The Firm may terminate this Contract upon seven days written notice. If terminated, Client agrees to pay the Firm for all Basic and Additional Services rendered and Reimbursable Expenses incurred up to the date of termination. Upon not less than seven days' written notice, Landscape Architect may suspend the performance of its services if Client fails to pay the Firm in full for services rendered or expenses incurred. The Firm shall have no liability because of such suspension of service or termination due to nonpayment.

**9. Indemnification**

The Firm agrees, to the fullest extent permitted by law, to indemnify and hold harmless the Client up to the amount of this contract fee for services from loss and expense, including reasonable attorneys' fees, to the extent caused by Firm's negligent acts, errors or omissions in the performance of the work under this Contract. Firm shall not be liable for special, incidental or consequential damages, including, but not limited to loss of profits, revenue, use of capital, or for any other loss of any nature, whether based on contract, tort, negligence, strict liability or otherwise, by reason of the work done under this Contract. The Client agrees, to the fullest extent permitted by law, to indemnify and hold harmless the Firm from any damage, liability or cost, including reasonable attorneys' fees and costs of defense arising from this project, to the extent caused by the Client's negligent acts, errors or omissions and those of its other Firms, sub-consultants or consultants (whether or not the Client is legally liable for them) or anyone for whom the Client is legally liable. In the event of joint or



concurrent negligence, Firm shall bear only that portion of the loss or expense that its share of the joint or concurrent negligence bears to the total negligence (including that of the third parties) which caused the personal injury or damage.

**10. Limitation of Liability**

In any event, in recognition of the relative risks and benefits of the project, the Client and the Firm have allocated the risks such that the Client agrees that to the fullest extent permitted by law, the Firm's total aggregate liability to the Client for any and all injuries, claims, costs, losses, expenses, damages of any nature whatsoever or claim expenses arising out of this Contract from any cause or causes, including attorney's fees and costs, and expert witness fees and costs, shall not exceed the total Firm's fee for the work rendered on this project.

**11. Dispute Resolution**

Client and Firm agree to mediate claims or disputes arising out of or relating to this Agreement as a condition precedent to litigation. The mediation shall be conducted by an agreed upon mediation service acceptable to the parties. A demand for mediation shall be made within a reasonable time after a claim or dispute arises and the parties agree to participate in mediation in good faith. Mediation fees shall be shared equally. In no event shall any demand for mediation be made after such claim or dispute would be barred by the applicable law.

**12. Ownership of Documents**

Copies of the final documents may be retained by the Client at the completion of the project for their records in both print and digital PDF versions. All instruments of professional service prepared by the Firm, including, but not limited to, drawings and specifications, are the property of the Firm, and these documents shall not be reused on other projects without Firm's written permission. Any reuse or distribution to third parties without such express written permission or project-specific adaptation by the Firm will be at the Client's sole risk and without liability to the Firm or its employees, and subcontractors. Client shall, to the fullest extent permitted by law, defend, indemnify, and hold harmless Client from and against any and all costs, expenses, fees, losses, claims, demands, liabilities, suits, actions, and damages whatsoever arising out of or resulting from such unauthorized reuse or distribution. The Firm reserves the right to include representations of the Project in its promotional and professional materials.

**13. Governing Law**

This Agreement is governed by the laws of the State of Illinois.

**14. Entire Agreement and Severability**

This Agreement is the entire and integrated agreement between Client and the Firm and supersedes all prior negotiations, statements or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both Client and Firm. In the event that any term or provision of this agreement is found to be void, invalid or unenforceable for any reason, that term or provision shall be deemed to be stricken from this agreement, and the balance of this agreement shall survive and remain enforceable.

**15. No Assignment**

Neither party can assign this Agreement without the other party's written permission.

**16. Expiration of Proposal**

If this agreement is not accepted within 120 days, the offer to perform the described services is withdrawn and shall be null and void.

IN WITNESS WHEREOF, the parties hereto have executed this agreement this \_\_\_\_ day of \_\_\_\_\_, 2025.

Client

Sign: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Upland Design Ltd

Sign: 

By: Michelle A. Kelly, President

## ATTACHMENT A

# Project Approach



The Village of Lake Zurich owns and maintains over 247 acres of property in southwest Lake County from undeveloped natural park sites to larger active community parks. The Park and Recreation Department's strives is to enrich the quality of life in the community by maximizing the value of parks and services, practicing environmental stewardship, and providing a diversity of uses and recreational opportunities for residents and visitors of all ages and abilities.

The Village is currently looking to create a Master Plan to assess, analyze, and provide a strategic framework for the improvement and development of their five Key Parks: Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurites Park. The plan's main purpose is assessing current park conditions, identifying existing needs, and developing a phased schedule of improvements over the next five to ten years with the priority of focusing on sustainability.

Upland Design Ltd proposes to assist the Village in creating this Master Plan, along with Engineering Resource Associates to advise on sustainability and stormwater as well as ETC Institute to prepare and analyze with the community-side survey. The planning process will engage residents in meaningful and diverse ways along with Village staff, key stakeholders, partners, and the Village Board to create a vision that inspires the community for the future of the five key parks. Key components of the planning process include the following six items:

- Comprehensive Assessment
- Community Engagement
- Sustainable Design
- Phased Development
- Financial Efficiency
- Long-term Vision

Our team of park planners, landscape architects, engineers, and strategists propose a three-phase approach for the planning effort as follows:

- Phase I: Site Analysis & Data Collection
- Phase II: Community Engagement & Concept Planning
- Phase III: Final Master Plan & Adoption

**Communication** will be a key factor throughout the process with monthly check in meetings between Village staff and the Upland Design planning team.

## Project Approach

### Phase I: Site Analysis & Data Collection

#### Kick Off Meeting

A meeting will be held with Village Parks and Recreation Department to kick off the project and review the planning process. The following items will be discussed:

- Project Goals and Objectives
- Confirming Roles and Responsibilities
- Project Scope and Methodology
- Public Engagement Plan and Community Stakeholders
- Timeline and Meeting Dates
- Content of Deliverables

#### Collect and Analyze Data

The Village has shared a number of documents including the 2024 Comprehensive Plan, the 2024 Equitable Use of Park Facilities Community Survey, the 2023 National Community Survey, the 2009 Open Space Master Plan, and the 2024 ADA Transition Plan. A review of any additional items that will help context will be shared. These could include but are not limited to the following:

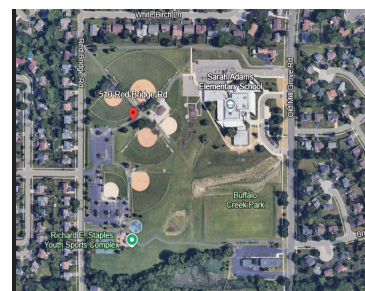
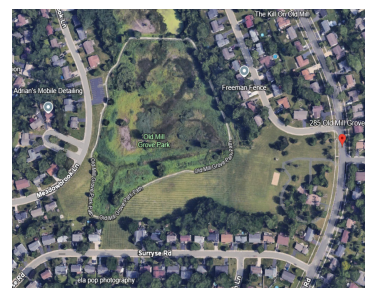
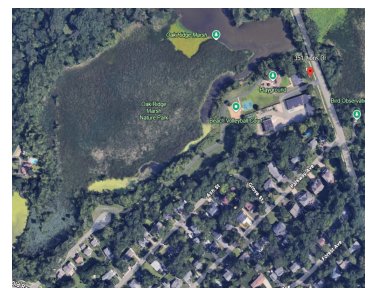
- Existing intergovernmental agreements for the five key park sites
- Past LWCF/OSLAD grants
- Village organizational chart
- Parks and recreation annual budgets for 2024 and 2025
- Current maintenance standards

#### Inventory and Analysis of Properties

Upland Design will perform a comprehensive assessment and review of existing conditions, focusing on the five key parks identified by the Village:

- Keuchmann Arboretum
- Oak Ridge Park
- Old Mill Grove Park
- Staples Park
- Zurites Park

Active recreational amenities including courts, fields and trails as well as support amenities such as parking lots, shade and site furniture will be assessed. Passive amenities and the landscape will be reviewed in collaboration with the environmental staff and engineers at Engineering Resources Associates in order to assess habitats, invasive species issues,





## Project Approach

### Phase I: Site Analysis & Data Collection

and effective stormwater management. The existing trails will be visited, photos taken and condition assessed. A summary of each site will be created with base park data and inventory.

#### Base Data

The Village will provide topographic surveys of the five key sites or GIS base data which can be prepared into AutoCAD format. Base data should include FIRM mapping as part each site along with any known wetland data. Upland will prepare the master plans using this base data so that drawings are scaled.

#### Capital Budget Parameters and Grant Planning

The Village will share the current budget process and parameters. This will include how and when non-tax funds are incorporated into overall planning. The planning team will review past capital budgets and suggest ways to incorporate grants, partnerships, and donations for future proposed improvements.

#### Prepare Site Analysis for Key Parks

The planning team will prepare one board of existing conditions for each of the five key park sites with improvements for each site. These will be shared and discussed with Village Staff. Comments and changes from this review will be used to create preliminary existing condition boards for the first public meeting.





## Project Approach

### Phase II: Community Engagement & Concept Planning

#### Community Engagement Overview

The goal of Phase II is to provide the Village with clear and accurate insights based on residents' opinions, input from partners including representatives of the Special Recreation Association of Central Lake County, other active local organizations, community leaders, user groups, and residents who may not regularly use Village resources. An overview of the Community Engagement is found on pages 38, while below gives detail on each element of Phase II.

#### Stakeholder Interviews

Interviews will be held with members of local organizations, community leaders, major partners, elected officials, staff, and park users. These will be scheduled and held in the afternoon and evening, in person and via virtual meetings, to give attendees flexibility in scheduling interviews. The planning team will prepare questions and documents answers. Their experiences and input will be added to the analysis.

#### Statistically Valid Community Wide Survey

ETC Institute will design, administer, and summarize the results of a statistically valid community wide survey regarding resources and recreational needs expressed by the community. The data from this work will help inform the needs analysis and program for the five key park sites. In addition, the information will be able to guide the Village for future planning priorities.

### Community Wide Survey

#### Designing the Survey and Prepare the Sampling Plan

ETC Institute will meet with Village staff to develop the content of the survey by phone/video conference. The goals and objectives for the project will be discussed. To facilitate the survey design process, ETC Institute will provide sample surveys created for similar projects. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the Village. The completed survey will contain up to 300 responses and be up to 6 pages in length.

#### Administering the Survey

- ETC Institute will administer the survey by a combination of mail and online.
  - a. Mail - ETC Institute will mail the survey and a cover letter (on Village letterhead) to all the households in the Village. Postage-paid envelopes will be provided by ETC Institute for each respondent that was randomly selected and received the survey in the mail. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it online. The cover letter will be mailed in English and will have information in other languages that direct respondents to either go online or call a toll-free number to complete their survey in their preferred language. Note that the survey will only be mailed in English and can be made available online or mailed in additional languages for an additional fee. The toll-free numbers can be offered in multiple languages and will ring ETC Institute's language lines where an interviewer will complete the survey over the phone with the assistance of an interpreter – this option is offered at no additional cost.
  - b. Online - The digital survey will be offered in English and can be made available in additional languages for an additional fee. Only one survey per household will be sent or accepted.

## Project Approach

### Phase II: Community Engagement & Concept Planning

#### Communit Wide Survey continued

- ETC Institute will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC Institute will continue following up with households until reaching the targeted number of completed surveys.
- ETC Institute will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- All respondents who complete the survey online will be required to provide their home address when they finish the survey. ETC Institute will match addresses from respondents who complete the survey online to the addresses that were selected for the sample to ensure the participant is part of the sample. If a respondent does not provide an address or the address is not part of the sample, it will not be included.
- ETC Institute will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the Village with regard to geographic dispersion, age, gender, race/ethnicity and other factors. ETC Institute will weight the data as needed if one or more demographic groups is over/underrepresented relative to recent Census estimates for the Village's population.
- ETC Institute will provide a copy of the overall results for each question on the survey.



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## Project Approach

### Phase II: Community Engagement & Concept Planning

#### Key Parks Needs Assessment and Recommendations

Upland Design will analyze input from the stakeholder interviews, the community wide survey, and the site analysis to create a list of community needs and desires along with a list of maintenance and improvements needed based on current condition of the parks as well as looking out 5 and 10 years. This analysis will allow the establishment of recommendations that align with current and possible resources while determining priorities for the changing needs of the Village.

**Review Meeting:** The planning team will meet with Village Representatives to review the assessments and recommendations for each of the key sites. The Village will give feedback and the design team will make updates to the recommendations and programs.

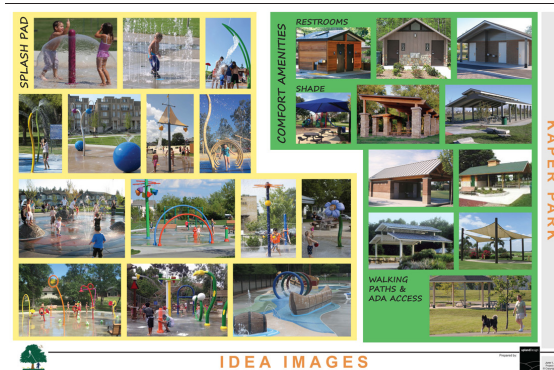
#### Develop Preliminary Ideas

The recommendations will guide the development of idea image board for recreation, sustainability, habitat, stormwater management and overall park elements. Each board will feature color idea photos and images for site improvements, enhancements, and amenities. The boards will be submitted to the Village for review, updated and printed for the first community open house.

#### First Community Open House

A community engagement event will be held to invite all residents to be part of the planning process. This meeting will include a short presentation on the planning process and an analysis of the five key parks. Input surveys along with stickers will be used to garner feedback. The Village will advertise the meeting and share it on social media. Advertisements and sign in sheets will be collected for possible future grant submittal. Attendees can then visit multiple stations to give input on items that include:

- Site Analysis Boards for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurites Park, along with an overall Village Park map
- Envision the Future at Lake Zurich with Idea Image Boards
- “Ask the Village” station - to allow residents to interact and talk with Village staff and officials





## Project Approach

### Phase II: Community Engagement & Concept Planning

The open house boards will be incorporated into an online survey which can be shared on the Village website to allow those who could not attend to give input. A summary of input will be created. Sign in sheets and the meeting invite will be saved for future grant submissions.

#### Prepare Park Programs

After initial public input, the planning team will write a Park Program for each of the five key parks. The Park Program gives a list of the active and passive amenities for each park along with sustainability, stormwater and natural areas improvements. These will be sent and reviewed by Village staff to ensure park elements align with the goals of the Village.

#### Sustainable Design Strategy

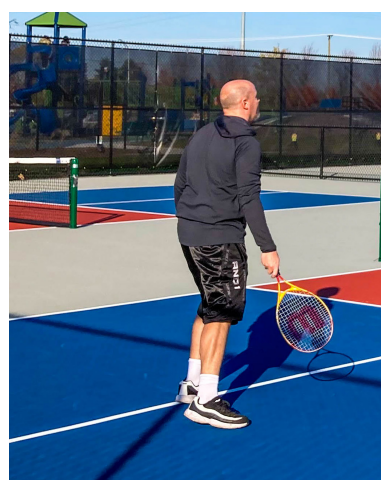
The team at Engineering Resource Associates Inc (ERA) will incorporate an inter-disciplinary approach to the design of sustainable elements for the five key parks. These include:

- *Stormwater Infrastructure*: Design or improvements necessary to protect buildings, infrastructure and environmental quality during storms.
- *Grey Infrastructure*: Sewer improvements, detention facilities, and other protocols needed to ensure that connected stormwater systems are designed and coordinated with these improvements.
- *Green Infrastructure*: Scalable solutions that feature the use of vegetation, soils and other natural processes to manage stormwater and create healthier urban environments.
- *Habitat Improvements*: Identification of invasive species areas, potential habitat improvements or new habitat areas that could enhance sites.

There is no “one size fits all” for green infrastructure projects. The project team will incorporate green infrastructure practices that will actually result in measurable stormwater runoff reduction, volume control, flood attenuation, increased water quality, and improved habitat functions, aesthetics, and values. In addition, ERA will utilize innovative planning practices to engage community members in better siting, design, and maintenance of green infrastructure in conjunction with community input.

#### Concept Development

Once the Park Programs are approved, Upland will prepare one concept for each key park incorporating the approved program elements and recommendations. Initial concepts will be black and white and prepared





## Project Approach

### Phase II: Community Engagement & Concept Planning

in Auto CAD. Proposed improvements including renovations, new amenities and proposed sustainability and landscape features will be shown. Color images of proposed improvements will be included on each plan. A cost estimate will be prepared using publicly bid data for local and regional park projects.

#### Review Meetings

The planning team will meet with Village representatives over two virtual meetings to review the concepts of the five key parks along with the detailed cost estimates. These virtual meetings will allow staff an in depth understanding of the 10 year improvement plans for the sites. Based on comments from the staff, the concepts will be adjusted, cost estimates updated, and the plans color rendered.

#### Second Community Open House

A second community engagement event will be held with presentation of the park programs and preliminary concepts with color images. This meeting will be completed in-person. Stakeholder interviewee and the entire community will be invited. The presentation will include a summary of the planning process, highlights of community input, and the five concept plans. The concept plans will be presented and shown on 24" x 36" boards with an updated written survey that will be made available for community input. Again, this data can be shared online to reach a wider audience. Sign in sheets and the meeting invite will be saved for future grant submissions

#### Recommendations for Potential Funding and Phases

A summary of internal funding, external funding, potential grant funding, and outside sources will be created. The Capital Development Projects for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurites Park will put into a 10 year chart, with projects highlighted with a phased approach for each site. A summary of expenditures and potential grants for each year will be included. Components will be prioritized according to community needs and then adjusted with cost estimates aligned with budget allocation and funding opportunities.



## Project Approach

### Phase III: Master Plan Development

With the Phase II community engagement and concept planning complete, the project team will collate and prepare a preliminary master plan document for staff and elected officials review. Final adjustments will be made following Village comments and then the final draft will be prepared. The report will be broken out into chapters to document the planning process, community engagement, sustainable design, phased development, financial efficiency, and long-term vision for implementation.

Deliverables will include:

- Executive Summary with Long Term Goals
- Key Parks and Amenities Assessment and Recommendations with Key Park Improvements, including Project Priorities
- Community Engagement Summary
- Community Wide Survey Summary
- Park Program for Each Site
- Master Plans for Kuechmann Arboretum, Oak Ridge Park, Old Mill Grove Park, Staples Park, and Zurites Park
- Cost estimates for each Master Plan
- Sustainability and Stormwater Management Strategies for each site
- 10-year Capital Plan with Cost Estimates for Five Key Parks with Alternative Funding Options
- Appendices
  - Community-Wide Survey Overall Results and Details

#### Board Presentation for Adoption

The Final Master Plan will be presented to the Parks and Recreation Board and Village of Lake Zurich Board. It will include the summary of findings from the assessment and community engagement, proposed improvements with master plans, priorities, and implementation strategies including budgets, and phasing. The Village of Lake Zurich Board will have the opportunity to view the final document and adopt the plan as part of a public Board meeting. Below is a sample of how a phased plan is created for one site including grant funds with a five year plan.

Summary Cost		Phase 0 2025 - CD	Phase 1 2026	Phase 2 2027-2028 OSLAD Construction		Phase 3 2029	TOTAL COST
AREA	2025 COST						
Amphitheater & Plaza	\$ 4,002,616		\$ 4,202,747				\$ 4,202,747
Shade Shelter & Seating - 24' x 44' Shelter	\$ 600,542			\$ 660,596			\$ 660,596
Trail Loop Path: 0.41 Miles	\$ 2,188,220		\$ 1,148,815	\$ 601,760		\$ 656,466	\$ 2,407,042
Formal Garden Area	\$ 419,214				\$ 115,284	\$ 377,292	\$ 492,576
Stormwater Detention and Pollinator Garden	\$ 256,064		\$ 241,980		\$ 28,167		\$ 270,148
Game Area	\$ 192,705				\$ 105,988	\$ 115,623	\$ 221,611
2-12 Playground Area	\$ 528,541				\$ 581,395		\$ 581,395
Parking Lot	\$ 554,658			\$ 610,123			\$ 610,123
Permanent Restroom Building	\$ 827,630			\$ 910,393			\$ 910,393
Restroom Enclosure	\$ 12,867				\$ 14,154		\$ 14,154
15% Contingency	\$ 1,409,268		\$ 839,031	\$ 386,896	\$ 143,566	\$ 153,543	\$ 1,523,036
A/E Design Fees/Permitting	\$ 1,204,466	\$ 341,852.46	\$ 300,000	\$ 355,944	\$ 132,081	\$ 141,259	\$ 1,271,137
<b>Total Per Phase</b>		<b>\$ 341,852</b>	<b>\$ 6,732,575</b>	<b>\$ 3,525,714</b>	<b>\$ 1,120,634</b>	<b>\$ 1,444,183</b>	<b>\$ 13,164,958</b>
<b>Yearly Estimated Inflation Rate</b>			5%	10%		20%	
<b>Potential Grant Assistance</b>					600,000.00		\$ 600,000
<b>Total Per Phase with Grant Assistance</b>		<b>\$ 341,852</b>	<b>\$ 6,732,575</b>	<b>\$ 3,225,714</b>	<b>\$ 820,634</b>	<b>\$ 1,444,183</b>	<b>\$ 12,564,958</b>

**END OF ATTACHMENT A**

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## ATTACHMENT B

COST BY TASK AND TITLE FORM by UPLAND DESIGN LTD									
Development of a Master Plan for Five Key Parks									
Village of Lake Zurich		Upland Design Ltd				ERA	ETC		
Phase	Hourly Rate	Principal Landscape Architect	Project Manager Land Architect	Landscape Designer	Doc Tech/Admin	Environmental-Civil Engineer	Community Wide Survey	Total Hours	TOTAL COST
		\$ 258.00	\$ 198.00	\$ 160.00	\$ 101.00	\$ 235.00	\$ 150.00		
<b>1.00 Phase I - Site Analysis and Data Collection</b>									
	Kick-Off Meeting	3	3					6	
	Collect and Analyze Data & Visit Five Key Sites	3.5	15	15				33.5	
	Inventory and Analysis of Properties	2.5	5	10		14.5		32	
	Capital Budget and Grant Planning	1	2		2			5	
	Site Analysis Board Preparation	1	3	10	1			15	
	HOURLY SUB-TOTAL	11	28	35	3	14.5		91.5	
	COST SUB-TOTAL	\$ 2,838	\$ 5,544	\$ 5,600	\$ 303	\$ 3,408		183	\$17,693
<b>2.00 Phase II - Community Engagement and Concept Planning</b>									
	Key Stakeholder Interviews	2	8	8	2			20	
	Community Wide Survey - ETC		4				Lump Sum	4	
	Key Parks Needs Assessment & Recommendations	3	6	8				17	
	Develop Preliminary Ideas Boards	1	4	8		5		18	
	Review Meeting	2	2	2				6	
	First Community Open House & Prep	4	4	8				16	
	Prepare Park Programs	8	2		2	5		17	
	Concept Development & Cost Estimates	12	32	96	4	6		150	
	Review Meetings	8	8	8				24	
	Second Community Open House & Survey Prep	4	4	11				19	
	Sustainable Design - ERA					16		16	
	Recommendations for Potential Funding and Phases	2	4	4	2			12	
	HOURLY SUB-TOTAL	46	78	153	10	32	0	319	
	COST SUB-TOTAL	\$ 11,868	\$ 15,444	\$ 24,480	\$ 1,010	\$ 7,520	\$ 13,000	\$ -	\$73,322
<b>3.00 Phase III - Final Master Plan and Adoption</b>									
	Preparation of Final Master Plans	4	4	12	2			22	
	Board Presentation		3	3				6	
	HOURLY SUB-TOTAL	4	7	15	2	0	0	28	
	COST SUB-TOTAL	\$ 1,032	\$ 1,386	\$ 2,400	\$ 202	\$ -	\$ -	\$ -	\$5,020
<b>5.00 Reimbursables</b>									
5.10	Mileage, Tolls, Postage, Delivery and Printing								\$ 2,875
<b>TOTAL</b>		<b>\$ 15,738</b>	<b>\$ 22,374</b>	<b>\$ 32,480</b>	<b>\$ 1,515</b>	<b>\$ 10,928</b>	<b>\$ 13,000</b>		<b>\$98,910</b>
		Upland Design Ltd				ERA	ETC		Total

## END OF ATTACHMENT B

## Project Lump Sum Budget





*At the Heart of Community*

FIRE DEPARTMENT

321 South Buesching Road  
Lake Zurich, Illinois 60047

(847) 540-5070  
LakeZurich.org

MEMORANDUM

To: Ray Keller, Village Manager **PK**  
From: David Pilgard, Fire Chief  
Date: June 6, 2025  
Subject: Paramedic Billing Services Agreement

AGENDA ITEM  
6e

**Issue:** The Village of Lake Zurich seeks new ambulance billing services, which was last updated in 1997.

**Background:** The current ambulance services billing agreement was established in 1997 with Andres Medical Billing. Since that time Andres Medical Service was acquired by EMS MC, the current billing provider for ambulance services for the Village of Lake Zurich. In addition, many regulatory and compliance changes have occurred involving billing practices for Emergency Medical Service (EMS) providers.

**Analysis:** Village staff from the Fire Department and Accounting & Finance Department collaborated to update the ambulance services billing agreement and review the service provider to ensure that the ambulance services agreement aligned with Village strategic goals, complied with regulatory standards of EMS billing and ensure that a high level of customer support and services was provided.

The need for the Village to bill for ambulance service aligns with the Village's strategic goals of Financial Sustainability and Service Sustainability. The Village bills for ambulances services based on applicable ambulance billing regulations and practices that afford the community to receive EMS services that are cost-effective, reliable and sustainable.

Village staff also sought an ambulance billing agreement with a vendor that is well versed in the regulatory standards of ambulance billing, provided a high level of timely customer service and provided appropriate and compliant accounting reporting.

As Village staff researched the limited number of ambulance service providers known available, Paramedic Billing Services stood out. Paramedic Billing Services is an Illinois based company. Village staff corresponded with and held a series of meetings with Paramedic Billing Services to ensure the services required by the Village would be provided. Though the fee structure (4.0% of revenues collected) remains the same as with Andres/EMS, PBS offers greater customer and administrative support to the Village, particularly with accounting, record keeping and federal and state reimbursement submittals.

**Recommendation:** Village staff recommends the approval of the Paramedic Billing Services Inc. agreement for the engagement of Paramedic Billing Services Inc. as the Villages ambulance billing services provider.

w/Attachments: Paramedic Billing Services Agreement 2025 (21 pages)



**PARAMEDIC BILLING SERVICES, INC.  
BILLING AGREEMENT  
FOR**

**Village of Lake Zurich**

Submitted By:

Firm Name: PARAMEDIC BILLING SERVICES, INC.  
Address: 395 W. Lake Street, Elmhurst, Illinois 60126  
Telephone: (630) 530-2991  
Fax Number: (630) 530-5099  
Contact: J Kevin Hunter

**2025**

2050125\_1



SCOPE OF SERVICES

The primary function of PARAMEDIC BILLING SERVICES, INC. pursuant to this Agreement is to bill individuals or entities on behalf of the VILLAGE OF LAKE ZURICH for fire, ambulance, or other services authorized under Client's ordinances and to collect funds directly from individuals, entities, guarantors, or third-party payers, as applicable,

**BILLING AGREEMENT  
FOR  
VILLAGE OF LAKE ZURICH**

THIS AGREEMENT made and entered into between the VILLAGE OF LAKE ZURICH (hereinafter referred to as "Client"), located at 70 E. Main St. Lake Zurich, IL. 60047 and Paramedic Billing Services, Inc. (hereinafter referred to as "PBS"), located at 395 W. Lake Street, Elmhurst, IL 60126 each a "Party" and collectively "Parties" effective on the date of execution of the Agreement by Client.

WITNESSETH:

WHEREAS, Client provides fire, ambulance, or other services authorized under Client's ordinances (hereinafter "Services") for the residents of its community and the surrounding community (hereinafter "Recipients");

WHEREAS, PBS is in the business of billing for Services; and

WHEREAS, Client and PBS desire that PBS handle all of the billing functions for Services provided by Client.

NOW, THEREFORE, in consideration of the mutual recitals and the promises contained herein and other good and valuable consideration, the sufficiency and receipt of which is hereby acknowledged by both Client and PBS, the Parties agree as follows:

1. Incorporation of Recitals. The recitals set forth above are hereby incorporated by reference into this Agreement and made a part hereof as if set forth in their entirety.
2. Incorporation of Attachments. All appendixes attached to this Agreement shall be incorporated and made part of the Agreement as if fully set forth in the Agreement.
3. Procedures. PBS shall prepare all bills and claim forms for Services provided by Client. Billing procedures shall be in accordance with the procedures set forth in the attached Appendix A. PBS shall send bills and claim forms to third party payers and/or to Recipients/Recipient guarantors, as appropriate. Client shall report all collections and Explanation of Benefits ("EOBs") to PBS on a timely basis, as provided in the attached Appendix A.
4. Billing Guidelines. PBS shall prepare all bills and claim forms for Services provided by Client pursuant to the Billing Guidelines set forth in the attached Appendix B.
5. Lockbox Account. Funds collected for Client by PBS shall be maintained in an account at a bank designated by Client and in the name of the Client.

6. **Reports and Accounting.** On or before the 15th day of each month that this Agreement is in effect, PBS shall provide Client with an accounting of all sums collected during the previous month, indicating the name of the Recipient, the date of service, the amount billed, and the amount collected. Upon request, PBS shall provide Client with additional information that is reasonably required to verify the accuracy of the accounting.
7. **Administration.** PBS shall be responsible for processing all documentation, as required under federal, state, and local law, regulation or guidance. If this Agreement or any documentation prepared in accordance with this Agreement is subject to or requested by any governmental agency, PBS shall have primary responsibility for complying with such request and shall truthfully respond to all agency requests, with notice to the Client, to the extent such notice is permitted by law or the applicable agency. If PBS or any third-party service provider engaged by PBS receives any legal notices, demands, subpoenas, or summons regarding this Agreement, to the extent allowed under law and deemed advisable by PBS counsel or its third-party service provider, PBS or its third-party service provider shall notify Client and give Client the opportunity to review and assist in a response. PBS shall keep adequate records at PBS's principal place. Client and its agents shall have the right to inspect such records and shall be given access to such records upon reasonable notice and at any reasonable time upon Client's request. This provision shall survive the termination of this Agreement. PBS shall preserve such books and records for the legally required time period.
8. **Programming.** PBS shall provide a separate and complete Accounts Receivable program within PBS's computer billing system for the exclusive purpose of collections for Client.
9. **Guidelines.** Client shall provide PBS guidelines for sending the bills and claims. Client shall provide PBS or authorize PBS to receive all information necessary to issue bills or claims.
10. **Fees.** Client shall pay PBS a fee of 4.0% for all payments collected, based on the payments received in the preceding month, whether payment is made to PBS or sent directly by the payer to Client. When PBS sends claims to a third-party collection agency, Client shall pay the collection agency fee in addition to the fee due to PBS per this section. Client agrees to provide PBS with notice and documentation of any payments directly received by it within ten [10] calendar days of receipt of said payment. PBS shall issue invoices on or before the 15th (fifteenth) day of each month for the preceding month; if the 15th falls on a weekend or holiday, invoices shall be issued the next business day. Client agrees to pay each invoice within forty-five (45) calendar days. No collection actions shall be brought against the Village or its residents, the Lake Zurich Rural Fire Protection District or its residents, or any other public entity with which the Village contracts or serves. Client agrees to pay each invoice within forty-five (45) calendar days. Any collection actions that are brought against others shall be as provided by current Village ordinance(s).

No other fees, besides those specified in this section, shall be paid by the Client to PBS,



for services to be provided by PBS to the Client pursuant to this Agreement.

11. **Billing in Name of Client.** All the billing for Services shall be in the name of the Client and on its behalf, including indemnification from third-party payers.
12. **Term.** The term of this Agreement shall be for a period of five (5) years commencing upon execution of the agreement ("Initial Term") unless sooner terminated pursuant to this Agreement. This Agreement shall automatically renew for additional one-year terms pursuant to the same terms and conditions set forth herein, except as otherwise agreed to by the Parties, unless sooner terminated by the Parties.
13. **Termination for Cause.** Either Party shall have the right to terminate this Agreement immediately upon the filing of a petition of bankruptcy, assignment for the benefit of creditors or the issuance of a cease and desist order or other action by any appropriate state, federal or local governmental agency or court of competent jurisdiction, which prohibits or threatens to prohibit, in whole or in part, either Party from performing the services required under this Agreement.
14. **Termination Without Cause.** Any party may terminate this agreement at any time by providing at least ninety (90) days advance written notice to the other parties via certified mail. Upon Termination, PBS shall cease acceptance of any additional accounts from Client. The Parties agree that the termination will apply to both the receipt of new accounts and old accounts by the Client. PBS will discontinue its collection efforts on Recipient accounts already in its possession effective one hundred eighty (180) calendar days after the termination of this Agreement. Additionally, PBS will cease its efforts in collecting Recipient accounts already placed with any external agency effective one hundred eighty (180) calendar days after the Termination of this Agreement. PBS shall assess a fee and pass on any collection agency fees as outlined in Section 10, "Fees", on any amounts paid to Client for payment of a claim placed with any external agency regardless of whether the fee was directly obtained by the external agency.
15. **Protection of Recipient Information.** All records relating to Services rendered by Client, including but not limited to protected health information (PHI) as defined under the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all subsequent amendments thereto, such as claims and run reports, shall be and remain the sole property of Client. PBS shall comply with all applicable laws and regulations relating to Recipient confidentiality including but not limited HIPAA and shall not use or further disclose confidential information or PHI other than as permitted or required by this Agreement, by law, or by the Business Associate Agreement attached hereto as Appendix C.
16. **Confidentiality.** Information made confidential by law shall be managed as provided by law. Trade secrets and confidential information that may be received by any Party or its employees, directly or indirectly, that are exempt from public disclosure under applicable laws shall remain the property of the disclosing Party and shall be kept confidential by

the Party to whom such trade secrets or confidential information was disclosed, provided that any protections for trade secrets must first be so designated by a Party, in writing to the other Party, in order to be protected. Similarly, any information being designated as confidential by a party, not otherwise expressly made confidential by law, must first be so designated by a Party, in writing to the other Party, in order to be protected. Such information will be utilized only for the purposes of carrying out the services and purposes of this Agreement, and each Party to which such information is disclosed shall cause each of its employees to comply with the foregoing. Upon termination of this Agreement, each Party agrees to surrender to the disclosing Party all trade secrets, confidential information, material, tangible items, or written information supplied by the disclosing party. The obligations of this section will survive the termination or expiration of this Agreement. Parties shall have the right to designate, in writing, any information it requires to be treated as a trade secret or confidential.

17. Relationship of the Parties. Notwithstanding anything to the contrary in this Agreement or elsewhere, PBS is an independent contractor with respect to the Client. There is no agency, employment relationship, partnership, or joint venture between the Contractor, its employees, and the Client and/or the Client's employees. No one connected with PBS, except in writing signed by the director of PBS has any right, power or authority to act or create any obligation or binding promises or agreements, express or implied except as specifically outlined herein.
18. Publicity. Neither party shall without the prior written consent of the other Party: (a) refer to, identify, or use the name or any trade name or trademark of the other Party or any of its employees in any advertising; (b) make publicity releases, promotional or marketing materials, customer listings, testimonials, or advertising regarding the other or any of its employees, this Agreement, the services, unless such disclosure is required by law. Any such trade name or trademark must be specifically identified, in writing, by either party, in order to be protected.
19. Payments to Third Parties. PBS shall comply with all federal, state, and local law, regulation or guidance regarding political donations and charitable contributions.
20. Entire Agreement. This Agreement contains the entire agreement and understanding between the Parties regarding the subject matter hereof and supersedes and replaces all prior agreements, negotiations, and arrangements concerning its subject matter; this Agreement is not subject to modification, alteration or amendment except by further written agreement signed by all Parties.
21. Non-Assignability. This Agreement shall be binding upon and inure to the benefit of the Parties hereto and their respective successors and assigns, provided, however, that this Agreement, nor any of the duties or responsibilities hereunder, shall not be assignable by either Party to an independent third party, without the prior written consent of the other Party or as specifically provided herein. At all times, PBS shall remain fully responsible for all its activities responsibilities and duties herein, and those of any subcontractors as may be expressly authorized herein



22. **Non-Waiver.** No waiver of any provision shall constitute a waiver of any other provision, nor shall any waiver be deemed continuing unless otherwise expressly so provided in writing by the Party against which the waiver is asserted.
23. **Severability.** If any portion of this Agreement is determined to be invalid by law or court interpretation: (1) the Parties agree to attempt in good faith to renegotiate the problematic provision to the mutual satisfaction of the Parties; or (2) if revision is deemed impermissible, that portion shall be removed from this Agreement. In the event the Parties are not able to mutually agree on modification of the problematic provision, then either Party may terminate this Agreement upon thirty (30) calendar days written notice to the other Party if the terminating Party has a good faith belief based on the advice of legal counsel that the problematic provision creates an unfavorable exposure under applicable laws. All other portions of this Agreement shall remain in full force and effect.
24. **Choice of Law and Venue.** This Agreement shall be governed by and construed in accordance with the laws of the State of Illinois without regard to its conflict of law principals. No provision of this Agreement shall be applied or construed in a manner inconsistent with applicable federal, state, and local law, regulation, or guidance. The Parties hereby agree that all actions or proceedings arising in connection with this Agreement shall be tried or litigated exclusively in the state courts located in Illinois, or in the federal district court located at Illinois Northern District Court to the extent permitted by law and a Party elects to file an action in federal court. The Parties hereby waive all objections to personal jurisdiction, venue, and forum non-conveniens.
25. **Compliance with Law.** Notwithstanding any other provision in this Agreement, and the Appendices attached hereto, each Party remains exclusively responsible for ensuring that any service provided pursuant to this Agreement complies with all pertinent provisions of federal, state, and local law, or regulation.
26. **No Third-Party Beneficiaries.** It is the explicit intent of the Parties hereto that no person or entity other than the Parties hereto, except assignees as contemplated in Section 21 is or shall be entitled to bring any action to enforce any provision of this Agreement against either of the Parties hereto.
27. **Notices.** All notices that are required hereunder, of which either Client or PBS may desire to serve upon the other Party, shall be in writing, personally delivered, sent by certified mail, return receipt requested, with postage prepaid, or by a recognized overnight carrier, to the Parties at the following address, (or at such other or further addresses as the Parties may hereafter designate by like notice similarly sent). Notices shall be deemed received upon receipt (if personally delivered), two (2) business days after deposit in the United States Mail (if mailed), or one business day after deposit with a recognized overnight carrier. If either Party chooses to use a recognized overnight carrier to deliver such notice, then the notice shall be by restricted delivery and only the person or persons listed below are the authorized signatories:

If to Client:

If to PBS:

David B. Hill, III, President  
Paramedic Billing Services, Inc.  
395 W. Lake St.  
Elmhurst, IL 60126

With a copy to:

J Kevin Hunter, Client Liaison  
Paramedic Billing Services, Inc.  
395 W. Lake St.  
Elmhurst, IL 60126

28. Subpoenas and Records Requests. PBS shall charge and retain fees as allowed under applicable federal, state, and local law, regulation or guidance for reproduction of medical records upon valid request, provided that no such fees shall be charged to the Client. PBS shall charge Client a court appearance fee of \$100.00 for each instance that a PBS employee is required to appear in court or at a deposition on behalf of or at the request of the Client.
29. Headings. The headings and subheadings in this Agreement are inserted for convenience of reference only and shall not affect the meaning or interpretation of this Agreement.
30. Signature. It is the responsibility of Client (when Client's employees are providing Services) to obtain the signature of the Recipient or verification that it could not be obtained for the HIPAA privacy notice, for consent to release records as necessary for payment, for assignment of benefits forms, and any other documents required by Medicaid, Medicare, or a third party payer (for purposes of this paragraph collectively "Payer") for any purpose including but not limited to establishing medical necessity. The Client shall (a) submit to PBS all signatures necessary to properly bill Payers or (b) verification that signatures could not be obtained. Upon receipt of the necessary signatures or verification, PBS shall bill the Payer. PBS shall send Client a list of accounts requiring signatures or verification. PBS shall also send an invoice to the Recipient containing a signature form notifying the Recipient that the signature form must be completed and sent to PBS for PBS to bill a Payer and that absent receipt, Recipient is responsible for payment.
31. Overpayments. In the event there are any overpayments due to third party payers based on Client's acts or omissions or for which PBS is otherwise not responsible (e.g. Client not obtaining signatures as required per Section 30 or Client not complying with the law as required in Section 32), PBS shall not assume any responsibility or liability for the overpayment and PBS shall keep the fees described in this Agreement.
32. Client's Compliance with Law. It is the responsibility of Client (when Client's employees are providing Services) to ensure compliance with local, state, and federal rules, and statutes.

33. Contract Interpretation. intentionally removed.

34. Non-Solicitation. The Parties agree not to, directly or indirectly, solicit, or cause or induce on its own behalf or for any third party to solicit, for the purpose of hiring any of the Parties' employees to perform like services for the duration of this Agreement unless mutually agreed by the Parties.

35. Execution. This Agreement may be executed in two or more counterparts, each of which shall be deemed to be an original, but all of which together shall constitute one and the same instrument.

36. Authority. PBS and Client represent that this Agreement is executed in accordance with the requirements of their respective organizations.

37. Amendment of Terms and Conditions. intentionally removed.

38. Screenings. Parties acknowledge that the Office of the Inspector General ("OIG") of the Department of Health and Human Services ("HHS") has the authority to exclude individuals and entities from federally funded health care programs pursuant to sections 1128 and 1156 of the Social Security Act. The OIG maintains a list of all currently excluded individuals and entities called the List of Excluded Individuals and Entities ("LEIE"). Exclusion databases are also maintained by state agencies that oversee the State Medicaid Program and by the U.S. General Services Administration.

Any health care entity or healthcare billing entity that hires or contracts with an individual or entity excluded from federally funded health care programs ("Excluded Person") may be subject to civil monetary penalties ("CMPs"). The primary effect of hiring or having an employee who is an Excluded Person or contracting or subcontracting with an Excluded Person is that no payment will be provided for any items or services furnished, ordered, or prescribed by the Excluded Person. Accordingly, if either Party employs an Excluded Person that impacts reimbursement under this agreement, that Party shall, to the extent permitted by law, be responsible for (i) reimbursing the other Party for services affected under this Agreement and (ii) any reasonable costs incurred by the non-responsible Party as a result of related OIG inquiries or investigations.

1. Each Party shall not knowingly employ or contract with any Excluded Persons.
2. Each Party shall immediately, but no later than three (3) business days, disclose to the other any information received or results of the background screening that may impact the Medicare/Medicaid or other government healthcare claim development and submission process and other processes affecting compliance with federal or state healthcare law, should they become aware of such information.



3. Once employed by Client, Client agrees to provide PBS a list of those employees that process information related to billing, and potentially subject to the above "excluded parties" search. PBS can conduct any further background screenings it deems necessary.

39. Medicare and Medicaid Enrollment. The Parties shall maintain and update their respective provider status in the Medicare and State Medicaid programs throughout the term of this Agreement. The Parties shall share all information required to maintain and update their provider status and their employees' individual provider status within the Medicare and State Medicaid programs as new credentialing requirements are mandated by those programs and program contractors.

40. Indemnification. It is expressly understood and agreed that each Party shall to the extent permitted by law, defend, indemnify, save, and hold harmless the other, its parent corporations, affiliates, subsidiaries, successors and assigns, and their respective present and former agents, officers, volunteers, and employees from any and all claims, liabilities, obligations, debts, charges, settlements or judgments (including attorneys' fees) arising from this Agreement or the other party's present and former agents, officers, volunteers, and employees attributable to the negligent acts or omissions, or breach of this Agreement, of the other Party, its agents, officers, and employees while engaged in the performance of duties under this Agreement, provided that no Party shall have any obligation under this section with respect to liabilities caused by the gross negligence, reckless, fraudulent or deliberately dishonest conduct, or intentional misconduct of the other Party seeking indemnification; and in the event that a final determination that such claims or liabilities resulted from such party's gross negligence, reckless, fraudulent or deliberately dishonest conduct, or intentional misconduct is made by a court of competent jurisdiction, the indemnified Party shall immediately refund such monies and expenses paid pursuant to this section. Neither Party shall be obligated to indemnify the other Party for any claim or liability:

(a) involving a claim by one Party against the other Party; (b) to the extent prohibited by law; (c) to the extent the Party seeking indemnification receives indemnification or insurance coverage from any other source. Provided that a Party is not in breach of its indemnification obligations hereunder, no Party being indemnified shall settle or compromise any claim subject to indemnification hereunder without the consent of the Party providing such indemnification.

Each Party also agrees to indemnify and hold each other harmless for any settlement or judgment based upon the sole theory of apparent agency arising from the negligent acts or omissions of the other and/or its employees or agents.

Notwithstanding the above paragraph, neither Party shall be liable to the other for indemnification for, and each Party hereby releases the other from, any liability for punitive, exemplary and consequential damages which may be suffered by such Party arising directly or indirectly out of the performance of this Agreement, including but not limited to the loss of use, loss of profits or business interruption (collectively, the

“excluded damages”); provided that amounts owed as consideration under this Agreement shall not be deemed excluded damages.

Notwithstanding the foregoing, nothing contained within this Agreement is intended to be a waiver or estoppel of the Client, PBS, or its respective insurer’s ability to rely upon the limitations, defenses and immunities contained within Illinois law, including, but not limited to Illinois Local Government Tort Immunity Act that may be applicable to the Client or PBS. To the extent that indemnification is available and enforceable, the parties or their respective insurers shall not be liable to indemnify or contribution for an amount greater than the limits of liability for claims established by law. Under no circumstances shall either party be required to indemnify the other for its own negligent or intentional conduct.

PBS is not an agent or joint-employer with Client under this Agreement. For purposes of any defenses or immunities to claims and liabilities to third parties that the Client and/or its employees may be entitled under applicable laws, the parties agree that, to the extent permitted by law, but without otherwise making PBS an agent of Client, PBS will be deemed the agent of the Client or standing in the shoes of the Client with respect to such defenses and immunities available to the Client.

The Indemnitee shall provide the Indemnitor with prompt written notice of any claim, demand, or action for which indemnification is sought under this Agreement. Such notice shall include sufficient detail to enable the Indemnitor to assess its obligations and prepare a defense, including the nature and basis of the claim, a description of the damages or relief sought, and copies of any relevant documents. The indemnitee’s failure to provide timely notice shall not relieve the Indemnitor of its indemnification obligations under this agreement, except to the extent such failure materially prejudices the indemnitor’s ability to defend the claim. Upon receipt of such notice, the Indemnitor shall have the right to control the defense and settlement of the claim, provided that no settlement may impose liability or obligations on the indemnitee without its prior written consent.

Upon receiving notice of a claim, the Indemnitor shall have the right to control the defense and settlement of the claim, provided that:

1. The indemnitor engages qualified legal counsel reasonably acceptable to the Indemnitee,
2. The indemnitor keeps the indemnitee reasonably informed of the defense’s progress and any material developments.
3. The indemnitor shall not settle any claim without the Indemnitee’s prior written consent if the settlement: (a) imposes liability or obligations on the Indemnitee beyond the scope of the agreement, (b) admits fault or wrongdoing on the part of the indemnitee, or (c) includes injunctive or equitable relief affecting the Indemnitee.

The indemnitee may participate in the defense of the claim at its own expense. If the indemnitor fails to assume or diligently conduct the defense within a reasonable time after receiving notice, the Indemnitee may assume control of the defense and settle the claim, and the Indemnitor shall remain responsible for all associated costs and damages. This indemnification obligation shall be deemed to be contractual in nature and shall survive

any termination of this Agreement.

41. Insurance. PBS shall purchase and maintain throughout the term of this Agreement insurance protection that is co-equal with its indemnity obligations. PBS shall procure and maintain during the life of this Agreement, commercial general liability insurance including, but not limited to data breach and cyber liability insurance, property damage and products and completed operations, in an amount not less than \$1,000,000 per occurrence. The policy shall provide contractual liability in the same amount. PBS' coverage shall be primary and non-contributory and list the Village of Lake Zurich, its officers, officials, agents and employees as additional insureds. Upon request of the Client, PBS shall provide Client a copy of a certificate of insurance demonstrating compliance with the provisions of this Section.

IN WITNESS WHEREOF, the Parties have hereunto set their seal this 9<sup>th</sup> day of January, 2025

VILLAGE OF LAKE ZURICH

PARAMEDIC BILLING SERVICES, INC.

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: David B. Hill

Its: \_\_\_\_\_

Its: President



## **APPENDIX A**

### **Billing Procedures**

1. PARAMEDIC BILLING SERVICES, INC. (PBS) shall provide electronic billing to all governmental and commercial carriers, where available. Otherwise, PBS shall provide paper billing on behalf of Client.
2. PBS will bill all appropriate government or commercial third-party payers as agreed to by Client or as required by federal, state, or local law, regulation, or guidance.
3. PBS will invoice all Recipients/Recipient guarantors as agreed to by Client or as required by federal, state, or local law, regulation, or guidance.
4. PBS shall issue invoices on a billing form specific to the Client.
5. PBS shall bill for Client's services in accordance with those rates determined by the Client or as required by the appropriate federal, state, or local law, regulation, or guidance. The Client shall provide PBS with current rates. For any rate changes that may be implemented, Client shall immediately provide PBS with written notice of the rate changes. 14 business day notice required.
6. Invoicing/collection activities will be conducted on the following schedule:
  - a. Immediate first steps:
    - i. PBS will verify patient insurance through portals, contact with patient, contact with receiving facility etc.
  - b. Except as otherwise required by law, invoicing for Recipients with no insurance identified or for which insurance billing is not applicable:
    - i. First invoice mailed within five business days after receipt of case source data.
    - ii. Second invoice mailed 30 calendar days after first invoice.
    - iii. Collection letter 30 calendar days after third invoice.
    - iv. If there is no payment plan established, and the account remains unpaid after the billing cycle has been completed, then the account balance will be turned over to a third-party collection agency.
  - c. Except as otherwise required by law, invoicing for Recipients with insurance identified:
    - i. Claim submitted to insurance carrier within five business days after receipt of case source data.
    - ii. If no payment is received within 45 calendar days from claim submission, an invoice will be sent to Recipient with message stating that there has been no payment or correspondence from their insurance carrier, and to please give the insurance carrier a call.

- iii. If Recipient is a resident, the claim will continue to follow the procedures listed above in "Invoicing for Recipients with no insurance identified." If there is no payment plan established and the account remains unpaid after the billing cycle has been completed, the account balance is written off.
  - iv. If Recipient is a non-resident, the claim will continue to follow the procedures listed above in "Invoicing for Recipients with no insurance identified." If there is no payment plan established, and the account remains unpaid after the billing cycle has been completed, then the account balance will be turned over to a third-party collection agency.
- d. If an insurance payment is received on behalf of the Recipient for the service and a balance is remaining, PBS shall send its first invoice within five business days after receipt of the insurance payment and follow up in accordance with the schedule set forth in 6c above.
- e. PBS reserves the right to change the procedures listed in this paragraph 6 as deemed necessary for operational, business, or legal reasons.
- 7. PBS accepts checks and all credit cards and may, in its discretion and in accordance with the law, absorb credit card fees to the cardholder.
- 8. PBS will set up payment plans where appropriate, consistent with standard policies and procedures and in accordance with law.
- 9. All payments shall be sent directly to the designated lockbox to allow rapid posting of payments. It is the client's responsibility to notify PBS of any payments received to Client within 72 hours of all payments, correspondence, explanation of benefits, etc. relating to the services described.
- 10. PBS will submit a monthly payment receipt recap, and a monthly trip report detailing transports billed from the previous month. It is the responsibility of Client to verify these reports and provide PBS with any missing data.
- 11. If Client becomes aware that PBS is not charging the correct rates, Client will advise PBS.

**INSERT APPENDIX B – BILLING GUIDELINES HERE**

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## APPENDIX C BUSINESS ASSOCIATE AGREEMENT

This HIPAA Business Associate Agreement (the "Agreement") is entered into on January 9, 2025 ("Effective Date") by and between the Village of Lake Zurich ("Covered Entity"), and Paramedic Billing Services, Inc. ("Business Associate") (each a "Party" and collectively the "Parties").

### 1. BACKGROUND

Business Associate performs functions, activities, or services for, or on behalf of, Covered Entity under an existing written agreement (the "Underlying Agreement") and Business Associate creates, receives, maintains, or transmits Protected Health Information ("PHI"), including Electronic Protected Health Information ("EPHI"), to perform such functions, activities, or services (referred to collectively as the "Services"). The purpose of this Agreement is to set forth the terms and conditions of disclosure of PHI by Covered Entity to Business Associate, to set forth the terms and conditions of Business Associate's use and disclosure of PHI, and to ensure the confidentiality, integrity, and availability of EPHI that Business Associate creates, receives, maintains, or transmits on behalf of Covered Entity. It is the intent of Covered Entity and Business Associate that this Agreement will meet the requirements of the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), the American Recovery and Reinvestment Act of 2009, Public Law 111-5 ("ARRA"), the Privacy Rule, and the Security Rule, 45 C.F.R. Parts 160 and 164.

### 2. DEFINITIONS

Terms used, but not otherwise defined, in this Agreement shall have the same meaning as those terms in HIPAA, ARRA, the Privacy Rule, and the Security Rule. Following are some of the key terms of this Agreement.

**2.1 Electronic Protected Health Information.** "Electronic Protected Health Information" or "EPHI" shall have the same meaning as the term "electronic protected health information" in 45 C.F.R. § 160.103, but shall be limited to the EPHI that Business Associate creates, receives, maintains, or transmits on behalf of Covered Entity.

**2.2 Individual.** "Individual" shall have the same meaning as the term "individual" in 45 C.F.R. § 160.103 and shall include a person who qualifies as a personal representative in accordance with 45 C.F.R. § 164.502(g).

**2.3 Minimum Necessary.** "Minimum Necessary" shall have the same meaning as "minimum necessary" described in 45 C.F.R. § 164.502(b) and Section 13405(b) of ARRA.

**2.4 Privacy Rule.** "Privacy Rule" shall mean the Standards for Privacy of Individually Identifiable Health Information at 45 C.F.R. Parts 160 and Part 164, subparts A and E.

**2.5 Protected Health Information.** "Protected Health Information" or "PHI" shall have the same meaning as the term "protected health information" in 45 C.F.R. § 160.103 but shall be limited to the information that Business Associate creates, receives, maintains, or transmits on behalf of Covered Entity.

**2.6 Required by Law.** "Required by Law" shall have the same meaning as the term "required by law" in 45 C.F.R. § 164.103.

2.7 *Secretary*. "Secretary" shall mean the Secretary of the United States Department of Health and Human Services or his designee.

2.8 *Security Incident*. "Security Incident" shall have the same meaning as "security incident" in 45 C.F.R. § 164.304.

2.9 *Security Rule*. "Security Rule" shall mean the Security Standards for the Protection of EPHI at 45 C.F.R. Parts 160 and 164, subparts A and C.

2.10 *Subcontractor*. "Subcontractor" shall have the same meaning as "subcontractor" in 45 C.F.R. § 160.103.

### 3. OBLIGATIONS AND ACTIVITIES OF BUSINESS ASSOCIATE

3.1 *Use and Disclosure*. Business Associate agrees to not use or disclose PHI other than as permitted or required by this Agreement and any Underlying Agreement(s) related to the Services, or as Required by Law. Business Associate shall also comply, where applicable, with the Privacy Rule and the Security Rule.

3.2 *Safeguards*. Business Associate agrees to use appropriate safeguards and comply, where applicable, with the Security Rule with respect to EPHI, to prevent use or disclosure of the information other than as provided for by this Agreement.

#### 3.3 *Business Associate's Reporting Obligations*.

(a) *Reports of Non-Permitted Use or Disclosure*. Business Associate agrees to report to Covered Entity any use or disclosure of the PHI not provided for by this Agreement of which Business Associate becomes aware. Where applicable, such a report shall comply with the requirements outlined in Sections 3.3(b) and 3.3(c).

#### (b) *Reports of Breach of Unsecured PHI*.

1. For purposes of this Section, "Breach" and "Unsecured PHI" shall have the same meaning as "breach" and "unsecured protected health information," respectively, as such terms are defined by 45 C.F.R. § 164.402.
2. Following the discovery of a Breach of Unsecured PHI, Business Associate shall notify Covered Entity of the Breach. Such notification shall be made without unreasonable delay after discovering the Breach, but no later than sixty (60) calendar days after its discovery.
3. Business Associate's notice shall include, to the extent possible, the identification of each Individual whose Unsecured PHI has been or is reasonably believed by Business Associate to have been, accessed, acquired, used, or disclosed during or as a result of the Breach. Business Associate shall also provide Covered Entity with at least the following information: a description of the Breach, including the date of Breach and the date of discovery of the Breach, if known; a description of the types of Unsecured PHI involved in the Breach; any steps Individuals should take to protect themselves from potential harm resulting from the Breach; a brief description of what Business Associate is doing to investigate the Breach, to mitigate harm to Individuals, and to protect against any further Breaches; and any

other information Covered Entity is required to include in notification to the affected Individual(s) under 45 C.F.R. § 164.404(c). Business Associate will provide additional information to Covered Entity as such information becomes available.

- (c) *Reports on Security Incidents.* Business Associate agrees to report to Covered Entity any Security Incident of which it becomes aware. Where applicable, such report shall comply with the requirements outlined in Sections 3.3(a) and (b). This Agreement serves as Business Associate's notice to Covered Entity that attempted but unsuccessful Security Incidents, such as pings and other broadcast attacks on Business Associate's firewall, port scans, unsuccessful log-on attempts, denials of service and any combination of the above, regularly occur and that no further notice will be made by Business Associate unless there has been a successful Security Incident.

3.4 *Subcontractors.* Business Associate agrees to ensure that any Subcontractor that creates, receives, maintains, or transmits PHI (including EPHI) on behalf of Business Associate agrees to substantially the same restrictions and conditions that apply through this Agreement to Business Associate with respect to such information, including but not limited to, compliance with the applicable requirements of 45 C.F.R. Parts 160 and 164. Such agreement between Business Associate and the Subcontractor must be made in writing and must comply with the terms of this Agreement and the requirements outlined in 45 C.F.R. §§ 164.504(e) and 164.314.

3.5 *Access to Designated Record Set.* The Parties do not intend for Business Associate to maintain any PHI in a Designated Record Set for Covered Entity. To the extent Business Associate possesses PHI in a Designated Record Set, Business Associate agrees to provide access, at the request of Covered Entity, to PHI in a Designated Record Set, to Covered Entity or, as directed by Covered Entity, to an Individual in order to meet the requirements under 45 C.F.R. § 164.524. Business Associate is not required to provide such access where the PHI contained in a Designated Record Set is duplicative of the PHI contained in a Designated Record Set possessed by Covered Entity. If an Individual makes a request for access pursuant to 45 C.F.R. § 164.524 directly to Business Associate, or inquiries about his or her right to access, Business Associate will either forward such request to Covered Entity or direct the Individual to Covered Entity.

3.6 *Amendments to Designated Record Set.* The Parties do not intend for Business Associate to maintain any PHI in a Designated Record Set for Covered Entity. To the extent Business Associate possesses PHI in a Designated Record Set, Business Associate agrees to make available such PHI for amendment and incorporate any amendment(s) to PHI in a Designated Record Set that Covered Entity directs or agrees to pursuant to 45 C.F.R. § 164.526 at the request of Covered Entity or an Individual. If an Individual submits a written request for amendment pursuant to 45 C.F.R. § 164.526 directly to Business Associate, or inquiries about his or her right to amendment, Business Associate will either forward such request to Covered Entity or direct the Individual to Covered Entity.

3.7 *Accounting of Disclosures.*

- (a) Business Associate agrees to document such disclosures of PHI and information related to such disclosures as would be required for Covered Entity to respond to a request by an Individual for an accounting of disclosures of PHI in accordance with 45 C.F.R. § 164.528.



- (b) Business Associate agrees to provide to Covered Entity or an Individual information collected in accordance with Section 3.7(a) of this Agreement, to permit Covered Entity to respond to a request by an Individual for an accounting of disclosures of PHI in accordance with 45 C.F.R. § 164.528.

3.8 *Compliance with Law.* To the extent Business Associate is expressly obligated under the Underlying Agreement(s) to carry out one or more of Covered Entity's obligation(s) under the Privacy Rule, Business Associate shall comply with the requirements of the Privacy Rule that apply to Covered Entity in the performance of such obligation(s).

3.9 *Internal Practices.* Business Associate agrees to make internal practices, books, and records relating to the use and disclosure of PHI received from or created or received by Business Associate on behalf of, Covered Entity available to the Secretary for purposes of the Secretary determining Covered Entity's compliance with the Privacy Rule and Security Rule.

3.10 *Mitigation.* Business Associate agrees to mitigate, to the extent practicable, any harmful effect that is known to Business Associate of a use or disclosure of PHI by Business Associate in violation of the requirements of this Agreement.

#### 4. PERMITTED USES AND DISCLOSURES BY BUSINESS ASSOCIATE

##### 4.1 *General Use and Disclosure.*

- (a) Except as otherwise limited in this Agreement, Business Associate may use or disclose PHI to perform Services for, or on behalf of, Covered Entity as such services may be specified in any Underlying Agreement(s), provided that such use or disclosure would not violate the Privacy Rule or the Security Rule if done by Covered Entity.
- (b) All uses and disclosures of PHI must comply with the Minimum Necessary requirements under the Privacy Rule. The Party disclosing PHI shall determine what constitutes the Minimum Necessary to accomplish the intended purpose of the disclosure.

##### 4.2 *Specific Use and Disclosure.*

- (a) Business Associate may use or disclose PHI to carry out Business Associate's legal responsibilities and for the proper management and administration of Business Associate, provided that any such disclosures are either (1) Required by Law, or (2) Business Associate obtains reasonable assurances from the person to whom the information is disclosed that it will remain confidential and used or further disclosed only as Required by Law or for the purpose for which it was disclosed to the person, and the person notifies Business Associate of any instances of which it becomes aware in which the confidentiality of the information has been breached.
- (b) Business Associate may use PHI to provide Data Aggregation services to Covered Entity as permitted by 45 C.F.R. § 164.504(e)(2)(i)(B).
- (c) Business Associate may use and disclose PHI to report violations of law to appropriate state and federal authorities, to the extent permitted or required by 45 C.F.R. § 164.502(j)(1) and state law.

- (d) Business Associate may use PHI to create de-identified information in accordance with the requirements outlined in the Privacy Rule. Data that has been de-identified will no longer be subject to the terms of this Agreement.

4.3 **Safeguards.** The Business Associate shall use appropriate safeguards to maintain the confidentiality, privacy, and security of PHI in transmitting PHI to the Covered Entity pursuant to this Agreement.

## 5. OBLIGATIONS OF COVERED ENTITY

5.1 **Privacy Practices.** The Covered Entity will notify Business Associate of any limitation(s) in its notice of privacy practices in accordance with 45 C.F.R. § 164.520, to the extent that such limitation may affect Business Associate's use or disclosure of PHI. Covered Entity will provide such notice no later than fifteen (15) days prior to the effective date of the limitation.

5.2 **Notice of Changes Regarding Individual Permission.** Covered Entity will obtain any consent or authorization that may be required by the Privacy Rule, or applicable state law, prior to furnishing Business Associate with PHI. Covered Entity will notify Business Associate of any changes in, or revocation of, permission by an Individual to use or disclose PHI, to the extent that such changes may affect Business Associate's use or disclosure of PHI. Covered Entity will provide such notice no later than fifteen (15) days prior to the effective date of the change.

5.3 **Notice of Restrictions to Use or Disclosure of PHI.** Covered Entity will notify Business Associate of any restriction to the use or disclosure of PHI that Covered Entity has agreed to in accordance with 45 C.F.R. § 164.522, to the extent that such restriction may affect Business Associate's use or disclosure of PHI. The covered Entity will provide such notice no later than fifteen (15) days prior to the effective date of the restriction. If Business Associate reasonably believes that any restriction agreed to by Covered Entity pursuant to this Section may materially impair Business Associate's ability to perform its obligations under the Underlying Agreement or this Agreement, the Parties will mutually agree upon any necessary modification of Business Associate's obligations under such agreements.

5.4 **Permissible Requests by Covered Entity.** Covered Entity shall not request Business Associate to use or disclose PHI in any manner that would not be permissible under the Privacy Rule or the Security Rule if done by Covered Entity, except that Business Associate may use or disclose PHI as set forth herein.

5.5 **Safeguards.** The Covered Entity shall use appropriate safeguards to maintain the confidentiality, privacy, and security of PHI in transmitting PHI to Business Associate pursuant to this Agreement.

## 6. TERM AND TERMINATION

6.1 **Term.** This Agreement shall be effective upon the Effective Date and shall remain in effect until all of the PHI provided by Covered Entity to Business Associate, or created or received by Business Associate on behalf of Covered Entity, is destroyed or returned to Covered Entity, or, if it is infeasible to return or destroy PHI, protections are extended to such information, in accordance with Section 6.3(b).

6.2 **Termination.**

- (a) Termination Resulting from the End of Services. This Agreement shall terminate if the Underlying Agreement(s) under which Covered Entity discloses PHI to Business Associate terminates for any reason, or if the Services that give rise to the necessity of a business associate agreement terminate for any reason.
- (b) Termination for Cause. Upon either Party's knowledge of a material breach of this Agreement by the other Party, the non-breaching Party must either:
  1. Provide an opportunity for the breaching Party to cure the breach or end the violation opportunity to cure the breach within thirty (30) business days, and if the breaching Party does not cure the breach or end the violation within thirty (30) business days, the non-breaching Party shall terminate this Agreement; or
  2. Immediately terminate this Agreement if cure is not possible.

#### 6.3 *Return or Destruction of PHI.*

- (a) Except as provided in paragraph (b) of this Section, upon termination of this Agreement for any reason, Business Associate shall return or destroy all PHI received from Covered Entity or created or received by Business Associate on behalf of Covered Entity, that Business Associate still maintains in any form. This provision shall also apply to PHI that is in the possession of Subcontractors of Business Associate. Business Associate shall retain no copies of the PHI.
- (b) In the event that Business Associate determines that returning or destroying the PHI is infeasible, Business Associate and its Subcontractors shall extend the protections of this Agreement to such PHI and limit further uses and disclosures of such PHI to those purposes that make the return or destruction infeasible, for so long as Business Associate and/or its Subcontractors maintain such PHI.

### 7. MISCELLANEOUS

7.1 *Regulatory References.* A reference in this Agreement to a section in the Privacy Rule, the Security Rule, HIPAA, or ARRA, or any other reference to a law or regulation, means the section or law as in effect as of the date of this Agreement or as subsequently amended.

7.2 *Amendment.* The Parties agree to take such action as is necessary to amend this Agreement from time to time to comply with the requirements of the Privacy Rule, the Security Rule, HIPAA, and ARRA.

7.3 *Survival.* The respective rights and obligations of Business Associate under Section 6.3 of this Agreement shall survive the termination of this Agreement.

7.4 *Interpretation.* Any ambiguity in this Agreement shall be resolved in favor of a meaning that permits compliance with the Privacy Rule, the Security Rule, HIPAA, and ARRA.

7.5 *Relationship to Other Agreement Provisions.* If a provision of this Agreement is contrary to a provision of an Underlying Agreement or Agreements under which Covered Entity discloses PHI to Business Associate, the provision of this Agreement shall control. Otherwise, this Agreement shall be construed under, and in accordance with, the terms of such Underlying Agreement or Agreements between the Parties.



**7.6 Prior Business Associate Agreements.** Consistent with Section 7.5, this Agreement shall supersede any and all prior business associate agreement(s), or terms of other agreements addressing the privacy and security of PHI, between the Parties.

**7.7 No Third-Party Beneficiaries.** Nothing expressed or implied in this Agreement is intended to confer, nor shall anything herein confer, upon any person other than Covered Entity or Business Associate any rights, remedies, obligations, or liabilities whatsoever.

**7.8 Modification of Agreement.** No alteration, amendment, or modification of the terms of this Agreement shall be valid or effective unless in writing and signed by Business Associate and Covered Entity.

**7.9 Relationship of Parties.** Business Associate, in furnishing services to Covered Entity, is acting as an independent contractor, and Business Associate has the sole right and obligation to supervise, manage, contract, direct, procure, perform, or cause to be performed, all work to be performed by Business Associate under this Agreement. Business Associate is not an agent of Covered Entity and has no authority to represent Covered Entity as to any matters, except as expressly authorized in this Agreement.

**7.10 Notices.** Any notices required or permitted to be given under this Agreement by either Party shall be given in writing: (a) by personal delivery; (b) by electronic facsimile with confirmation sent by United States first class mail; (c) by bonded courier or nationally recognized overnight delivery service; or (d) by United States first class registered or certified mail, postage prepaid, return receipt requested, addressed to the Parties at the addresses set forth below or to such other addresses as the Parties may request in writing by notice pursuant to this Section 7.10. Notices shall be deemed received on the earliest personal delivery, upon the next business day after delivery by electronic facsimile with confirmation that the transmission was completed or upon receipt by any other method of delivery.

**Covered Entity:** Village of Lake Zurich, 70 E. Main St., Lake Zurich, IL 60047

**Business Associate:** Paramedic Billing Services, Inc., c/o Privacy Officer, 395 West Lake Street, Elmhurst, IL 60126

**7.11 Governing Law.** This Agreement shall be governed by and interpreted in accordance with the laws of the State of Illinois.

**7.12 Counterparts.** This Agreement may be executed in two (2) or more counterparts, each of which shall be deemed an original and when taken together shall constitute one agreement.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by their duly authorized officers and made effective as of the Effective Date.

**Paramedic Billing Services, Inc.  
Business Associate**

**Village of Lake Zurich Covered Entity**

By: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

By: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_



# COMMUNITY DEVELOPMENT DEPARTMENT

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## MONTHLY INFORMATION REPORT

**May 2025**

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HIGHLIGHTING DATA METRICS  
TO IDENTIFY OPERATIONAL TRENDS  
AND  
FACILITATE INFORMED DECISION MAKING

505 TELSER ROAD  
LAKE ZURICH, IL 60047

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## DEPARTMENT NARRATIVE

During the month of May 2025, the Community Development Department was engaged in the following activities:

### **BUILDING & ZONING DIVISION:**

#### **Commercial Permits Issued:**

- 830 W IL RT 22: The UPS Store
- 291 S Rand Rd: Sola Salons

#### **Commercial Occupancies Issued:**

- 425 Enterprise: TufTile
- 557 Capital: Veteranson, Inc.
- 189 S Rand Rd: Simulation Zone

**FOIA Requests:** Total number of FOIA requests: 4

### **PLANNING AND DEVELOPMENT DIVISION:**

#### **The Planning and Zoning Commission meeting of May 21, 2025.**

The following applications were considered by the PZC at their regular meeting in May.

1. *17 Lake Street – Front Porch Variation – Ronald Vindell, property owner:* The Application was presented by the property owner, Mr. Ronald Vindell, proposing to convert a non-conforming concrete stoop into a full-width covered front porch that will encroach into the front yard setback. There were no objections to the variation. Upon closing the hearing, the PZC voted 7-0 to recommend approval. The item will likely be presented to the Village Board for consideration in June.
2. *Miscellaneous Text Amendments:* Community Development Director Saher presented the application to amend the codes to increase fence height from 5 feet in the interior side and rear yards to 6 feet. There was brief discussion regarding fence height as related to the topography where they are located. Staff also summarized other amendments being proposed to enhance the chapter on fences. There were no objections to the proposed text amendments. Upon closing the hearing, the PZC voted 7-0 to recommend approval. The item will likely be presented to the Village Board for consideration in June.
3. *Role of Lake County in the Permit Review and Inspection Process:* Community Development Director Saher and Building Services Supervisor Modrzejewski presented the PZC with an overview of the role of Lake County in the Permit Review and Inspection Process. Lake County has been contracted with Lake Zurich to provide these services since 2015.

4. *Highlights from the recent Plan Commission training.* Community Development Director Saher updated the PZC on the online 2-hour training webinar held on April 30. The webinar was also attended by Chairman Stratman and Commissioner Kovacevic, Village Planner Colleen McCauley, Building Services Supervisor David Modrzejewski. Director Saher complimented the PZC for already doing most of what the webinar instructors were recommending. The discussion highlighted and reinforced the role and responsibility of the Commission in the community, importance of adhering to sound Findings of Fact, Ex Parte Communication and Conflict of Interest requirements. Commissioners were encouraged to attend such training webinars when available in the future.

**New Zoning Applications for PZC consideration.**

The following applications are proposed for consideration by the PZC at its upcoming meeting on June 18.

1. *Miscellaneous Text Amendments:* Application to amend the provisions of the zoning and land development codes for certain land uses and to consider setting a time limit on the duration of development.

**New and Ongoing Development:**

1. *Calabrese Property Annexation at 24455 N US Highway 12.* Community Development staff held a meeting with Mr. Romeo Kapudija and his development consultant, Mr. Robbie Joseph, to discuss development and permit fees, the process, timeline, and other logistical matters pertaining to their forthcoming application to annex and develop the property into a new garage condo project. The team intends to submit the application and requisite documentation by July 18<sup>th</sup>, with the expectation of receiving consideration from the PZC in August.
2. *OSK at 670 S Old Rand Road.* The development will be known as The Reserve of Lake Zurich. The developer received a recommendation for final plan approval from the Planning and Zoning Commission at their March 19<sup>th</sup> meeting. Subsequently, staff began collaboration with the developer to refine their plans in anticipation of final approval from the Village Board.

OSK engaged the services of Gary Weber & Associates, a naturalist and wetland specialist company, to coordinate the streambank stabilization and restoration of the wetland within the northern 2 acres of the development at South Old Rand and Buesching Roads. Village development staff had a brief meeting with Ellen Raimondi of Weber & Associates to outline the requirements for this component of the project.

Concurrently, Mr. Neil Ornoff, the owner of OSK Capital Partners, authorized the LZ Fire Department to conduct training within the former Joern residence, scheduled for demolition to facilitate the construction of new development.

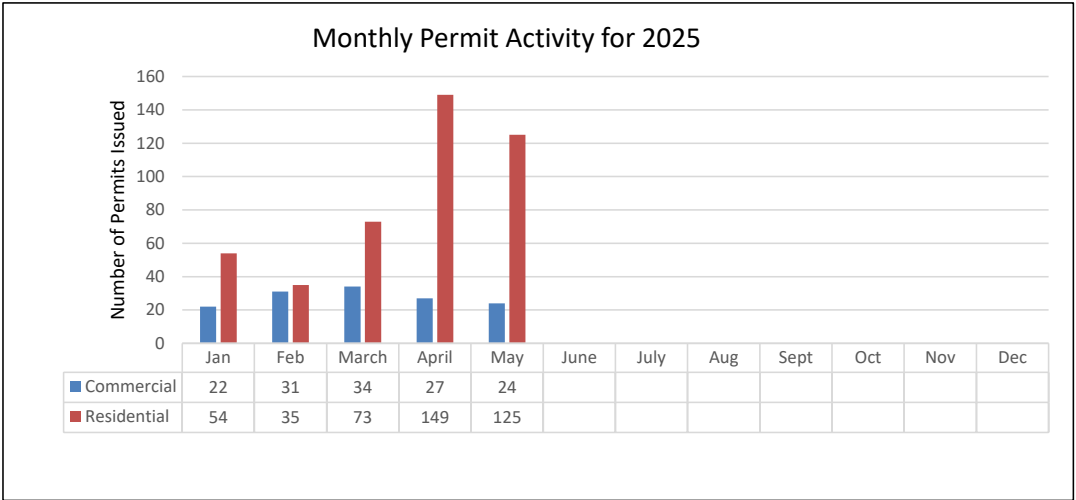
3. *Advocate Aurora Health at Northwest Corner of Route 12 and Miller Road.* Advocate Health Care was proposing to construct an approximately 12,500 square-foot outpatient clinic at the northwest corner of Miller and Rand Road. The properties were situated outside the municipal boundaries of the village and would necessitate their annexation to the village. Advocate Health Care presented its concept at a Courtesy Review on May 19 to solicit feedback on the proposal.

Advocate subsequently commenced coordination with Lake County DOT. In a meeting that included LC-DOT, Advocate, their engineering consultants, representatives of the current ownership and the

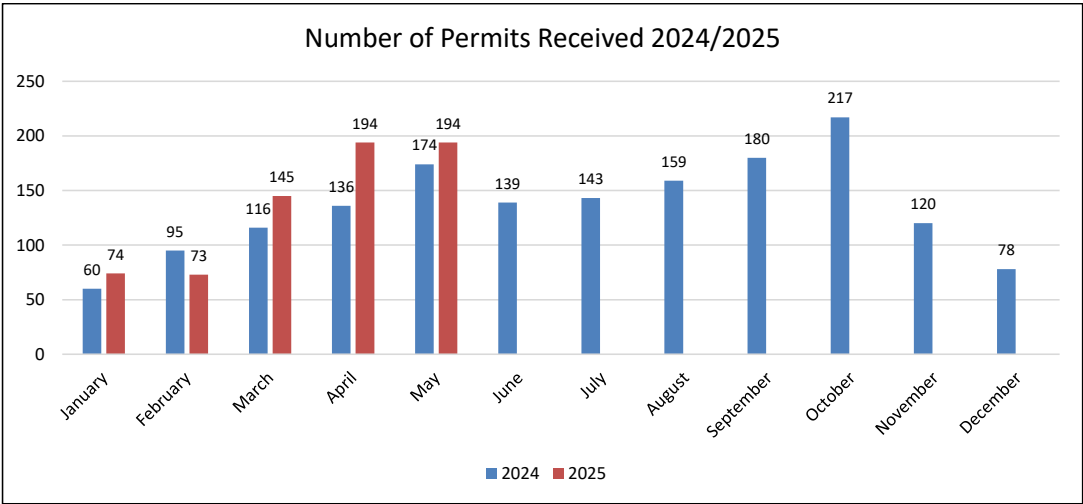


Village, items including Lake County and Lake Zurich permitting, zoning entitlement processes and timing were discussed. Advocate intended to submit an application for the new health clinic in June.

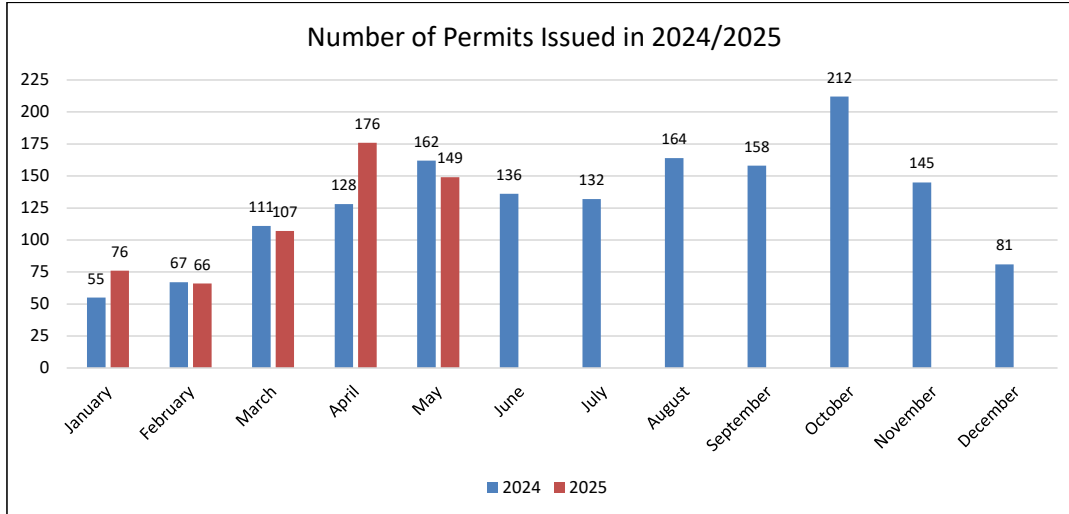
4. *173 W Main St (Block A)*. Mr. Derick Goodman of The Huron Group provided an update on soil borings conducted at the site. The findings revealed unsuitable materials and prior structure foundations that necessitate excavation, fill, and compaction to establish a stable subsurface for construction. Several storm water management options were also discussed. The revised plan, derived from the recently completed ALTA Survey, incorporated expanded guest parking and modifications to the commercial building. Mr. Goodman disclosed that they were seeing substantial interest in the space from prominent operators within the restaurant sector.
5. *Wildwood Estates of Lake Zurich*. Projades, the developers of the 24 duplex homes on the south side of Honey Lake Road began resurfacing Honey Lake Road. This was the final phase of the project and was proposed to be completed by the end of May. Residents on both sides of the street were notified by the developer of the impending road closure as well as restricted access to their properties. Village staff and Manhard's inspectors were on site to coordinate the work by the developer's contractors.
6. *Prep Kitchen Concept – 880-890 IL Route 22*. A business specializing in meal distribution from a central location expressed interest in the former Aveda Spa site located in the Oakwood Shopping Center. At this point, there is no intention to provide walk-up services. The site comprises two store fronts that have remained vacant since February 2023. The most recent party interested in the site was a cannabis dispensary, which was unable to reach an agreement with the center's owner.
7. *Sale of St. Peter United Church of Christ – 47 Church Street*. A meeting was held with a familiar developer, along with representatives from St. Peter's Board of Directors and their broker, to review and provide initial feedback on a preliminary site plan for single-family homes. This is the third concept presented to staff, ranging from town homes to a used automobile dealership.



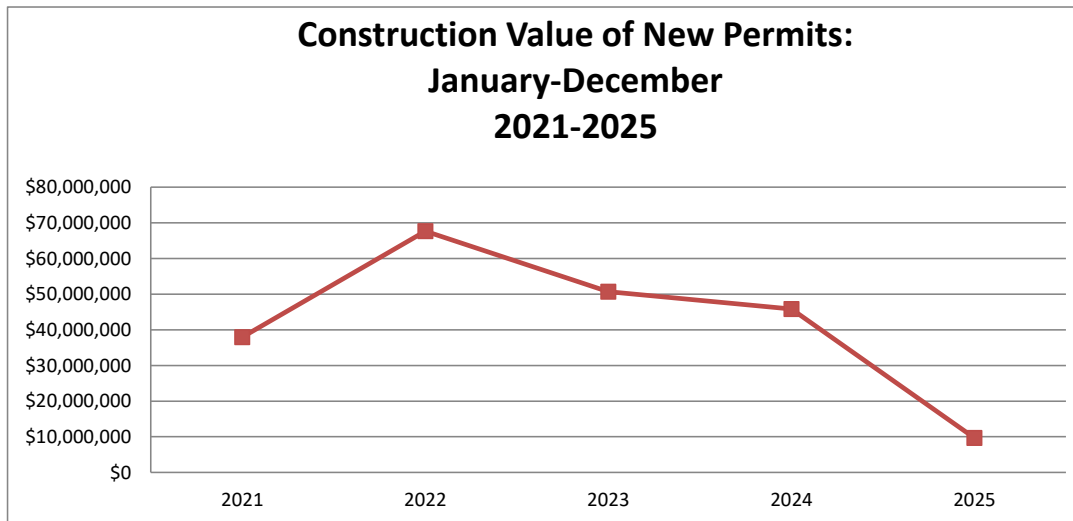
The chart above represents the total of permit for commercial and residential activity on a monthly basis for 2025. (Note: commercial activity includes both business and industrial activity)



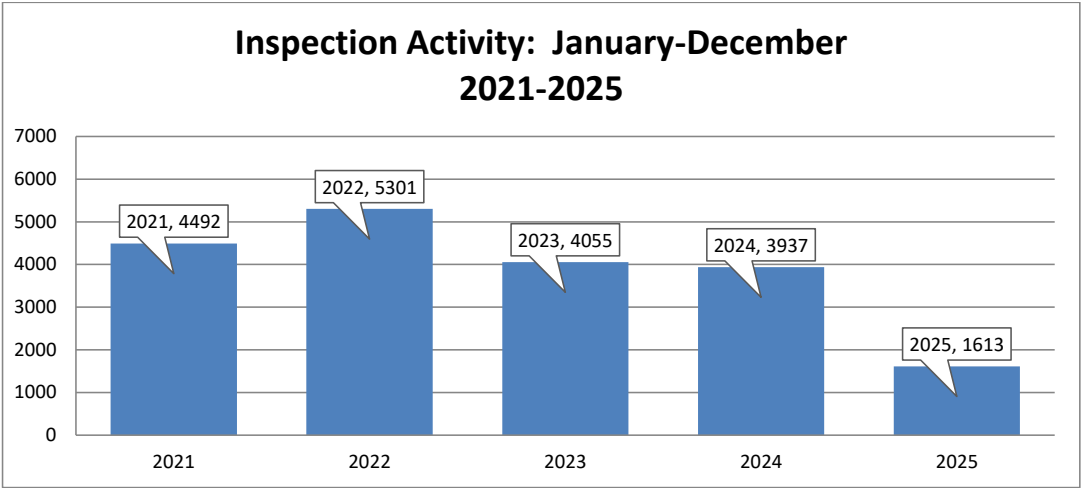
The chart above shows a month-by-month comparison of the number of permits received in 2024 and 2025.



The chart above shows a month-by-month comparison of the number of permits issued in 2024 and 2025.

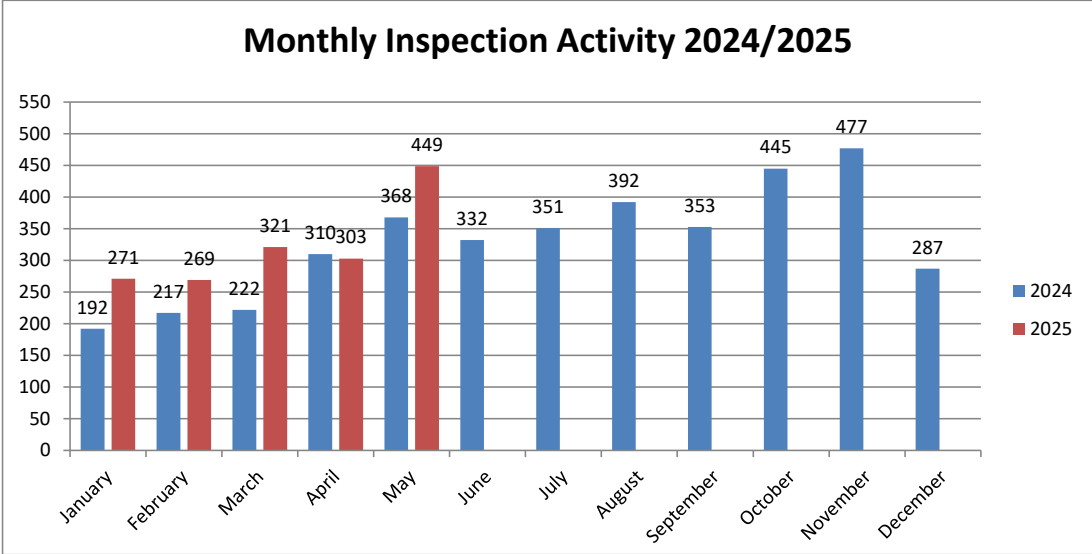


This chart tracks construction value of permit activity by year for 5 years.

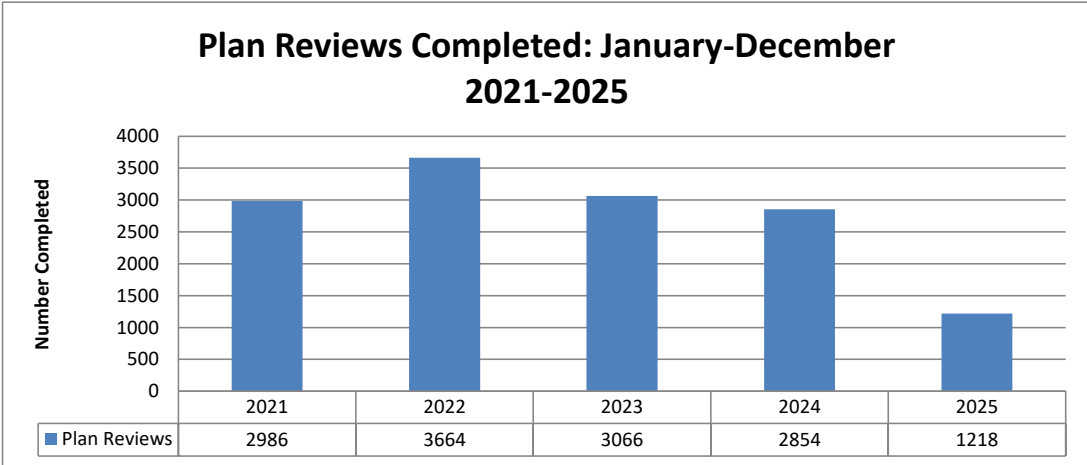


This graph illustrates the number of inspections performed by year for 5 years.

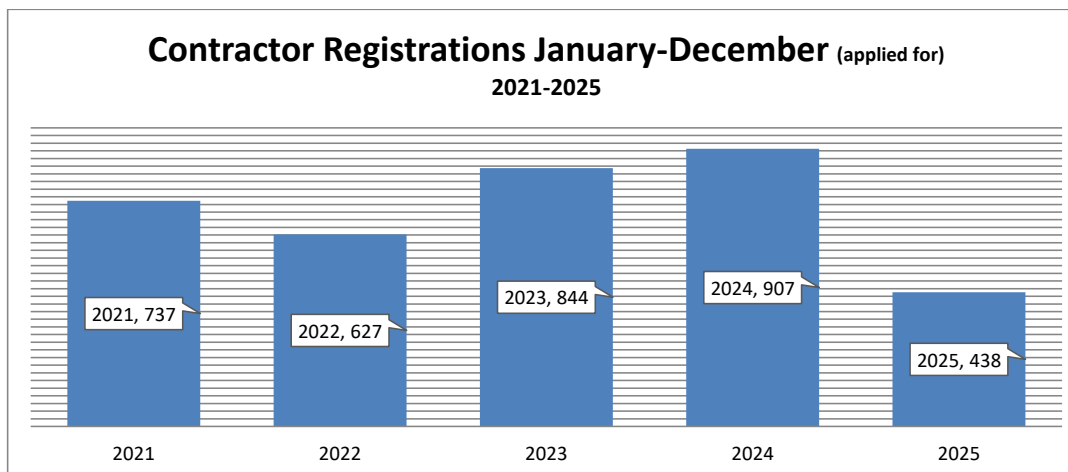




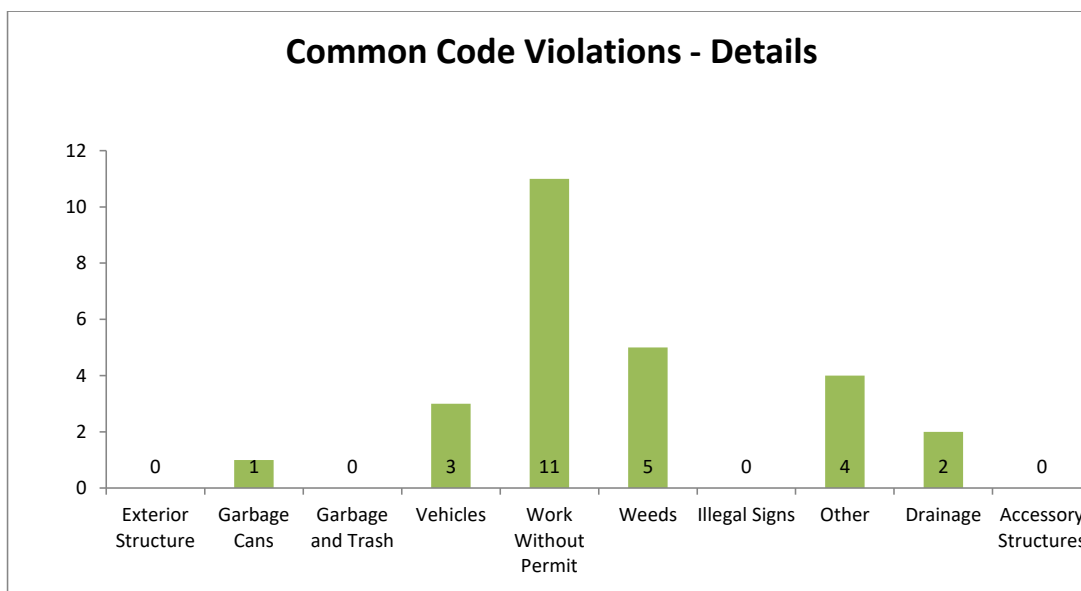
This chart indicates inspection activity on a monthly basis for 2025 compared to the previous year 2024.



This graph illustrates the number of plan reviews performed by year for 5 years.



The graph represents the number of contractor registrations for the year as compared to prior 4 years. Contractors are required to register on an annual basis to remain current with the village.



This graph illustrates the number of code violations reported for the month. The data varies from month to month and is season dependent.



# POLICE DEPARTMENT

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## MONTHLY INFORMATION REPORT

**MAY 2025**

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HIGHLIGHTING DATA METRICS  
TO IDENTIFY OPERATIONAL TRENDS  
AND  
FACILITATE INFORMED DECISION MAKING

70 E. MAIN STREET  
LAKE ZURICH, IL 60047

## Departmental Narrative

### General

- The Police Department processed 38 Freedom of Information requests this month. 7 of those requests involved body-worn camera videos/squad cam videos and required 15.25 hours of employee time to complete the video redactions. Processing the paper report requests took an additional 50+ hours of employee time.
- Our agency participated in an IDOT Memorial Day grant campaign from May 16<sup>th</sup> – May 27<sup>th</sup>. 45.75 grant hours were worked as part of the campaign. The grant hours yielded the following results: 8 speeding citations, 18 seat belt citations, 20 distracted driving citations, and 8 other citations.
- Lake Zurich PD observed National Police Week the week of May 11<sup>th</sup>.
- Department members supported Special Olympics Illinois on May 16<sup>th</sup> during the annual Cop on Top event at Dunkin Donuts. \$5364.00 was raised in 7 hours at our location.
- Cone with a Cop took place on May 6<sup>th</sup> at the Bear Family McDonald's.
- Our department received 4 new requests for solicitor permits, and are being reviewed at the time of this report. We received zero complaints from residents about solicitors. 1 raffle permit was requested and issued. 0 liquor licenses were requested.
- The bicycle safety helmet program started just prior to Memorial Day. The program will run through the summer months and end on Labor Day Weekend. Any child found riding a bicycle with a safety helmet properly worn, will receive a coupon for a free ice cream and will also be entered into a raffle to win a new bicycle and safety helmet.
- Officer Robertaccio conducted a traffic and bicycle safety presentation for students at Isaac Fox Elementary School this month. The presentation included important recommendations on how students can stay safe while riding their bicycles and walking, particularly when using roadways and crossing intersections.

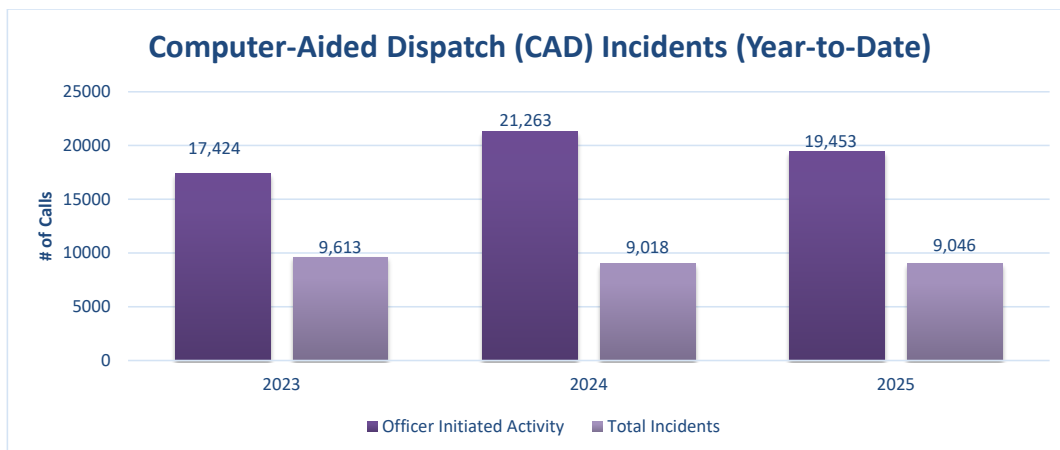
### Patrol and Communications

- Year-to-date, officers conducted 1798 traffic stops and issued 979 traffic citations.
- During the month, Dispatch handled 1918 9-1-1 calls and 3660 administrative calls.
- Officers Cordero, Robertaccio, and Gentry were officially sworn in at a public ceremony on May 5<sup>th</sup>.
- Our agency inspected two child safety seats this month.
- Our agency approved eight truck permits, totaling \$975 in the month of May.
- Officer Young was selected as one of the new deputy commanders of MCAT.

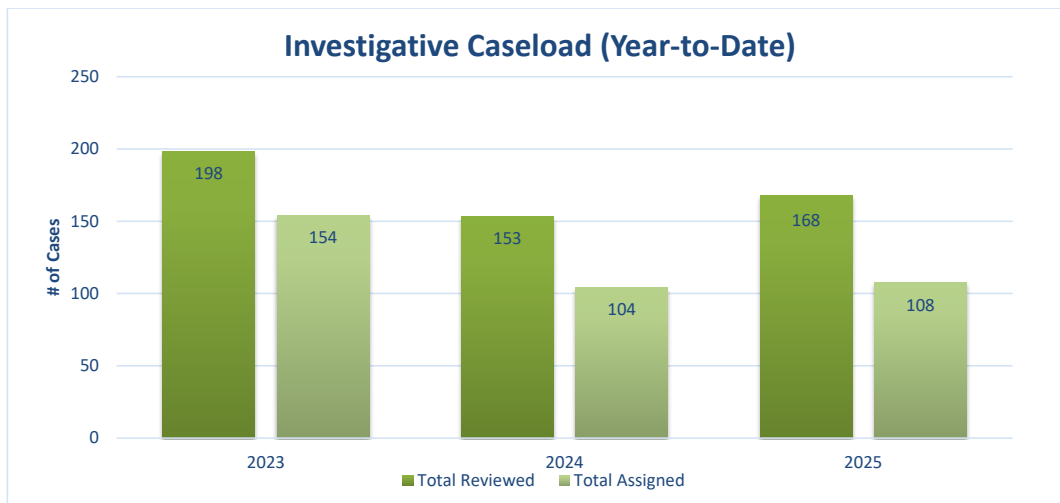
### Investigations

- The Criminal Investigations Division is currently investigating 47 cases, averaging 17.5 cases per detective. 1 case was sent to the Lake County State's Attorney's Office (LCSAO) and received a warrant for identified suspects this month.
- There were no Major Crime Task Force callouts this month.

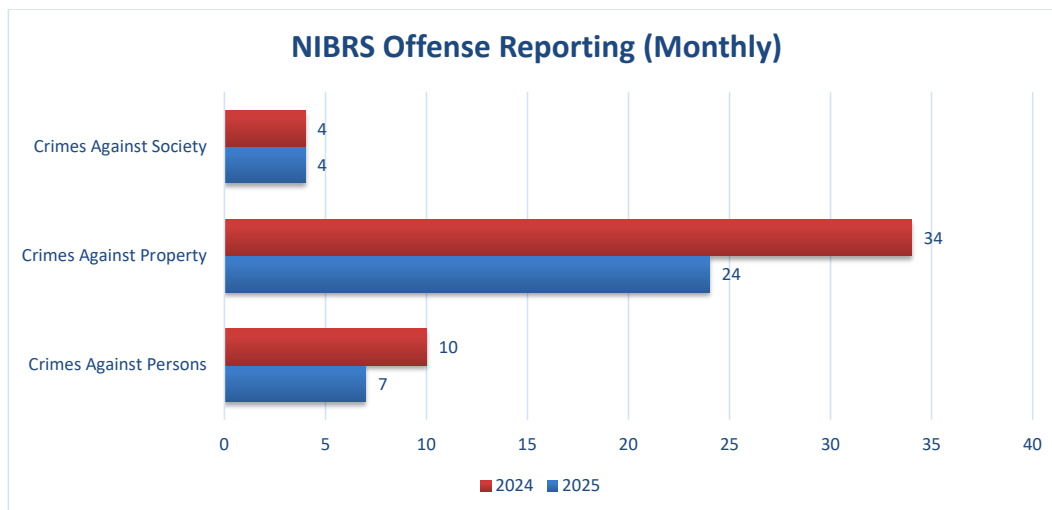




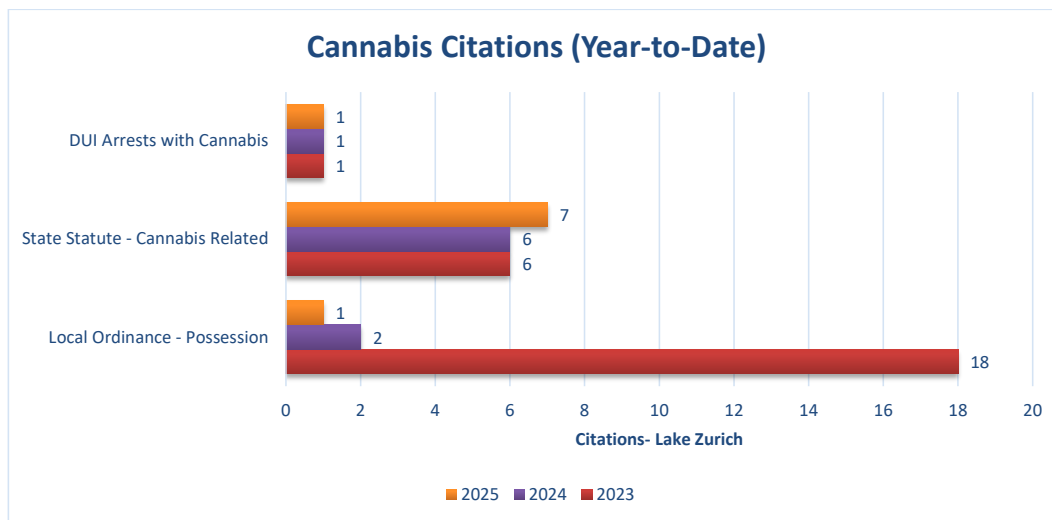
Officer initiated activity includes DUI Arrests, Vehicle Violation Citations, Non-Vehicle Violation Citations, Driving while License Suspended/Revoked, Crime Prevention Notices, Criminal Arrests, Traffic Citations, Traffic Stops, Extra Watches conducted, and Zero Tolerance enforcement. Total incidents are all CAD incidents. Frontline data, including vacation watches and directed patrols, are listed under officer-initiated activity.



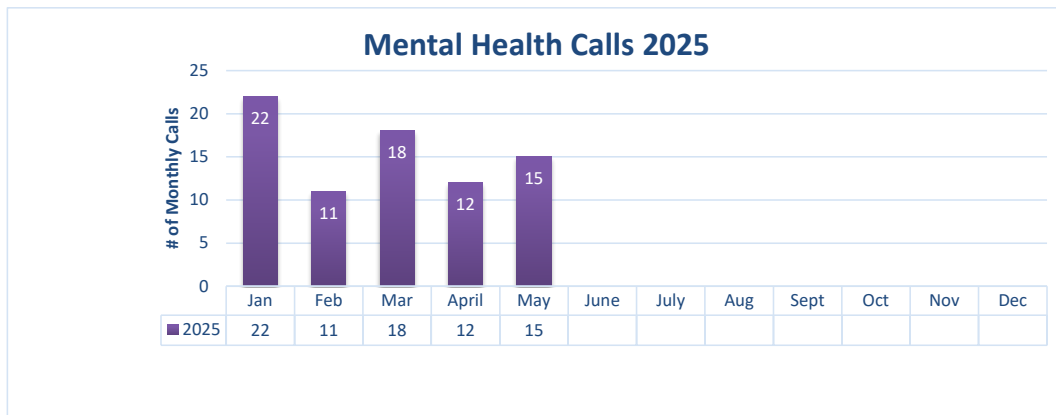
Original criminal reports, generally taken by Patrol section personnel, are reviewed by the Investigations Commander and assigned to Investigative personnel based on Solvability Factors.



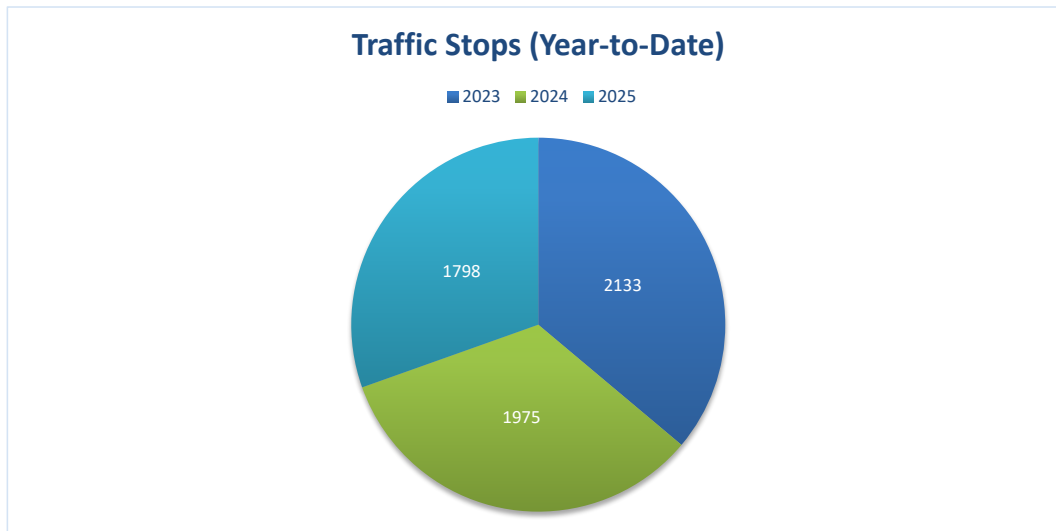
The Lake Zurich Police Department has switched over to the FBI's National Incident-Based Reporting System (NIBRS). Data is broken down into the following three categories: Crimes Against Persons, which include crimes such as murder, assault, and sex offenses; Crimes Against Property, which include crimes such as robbery, burglary, theft, fraud, and stolen property; and Crimes Against Society, which includes crimes such as drug/narcotic violations, pornography, and weapon violations.



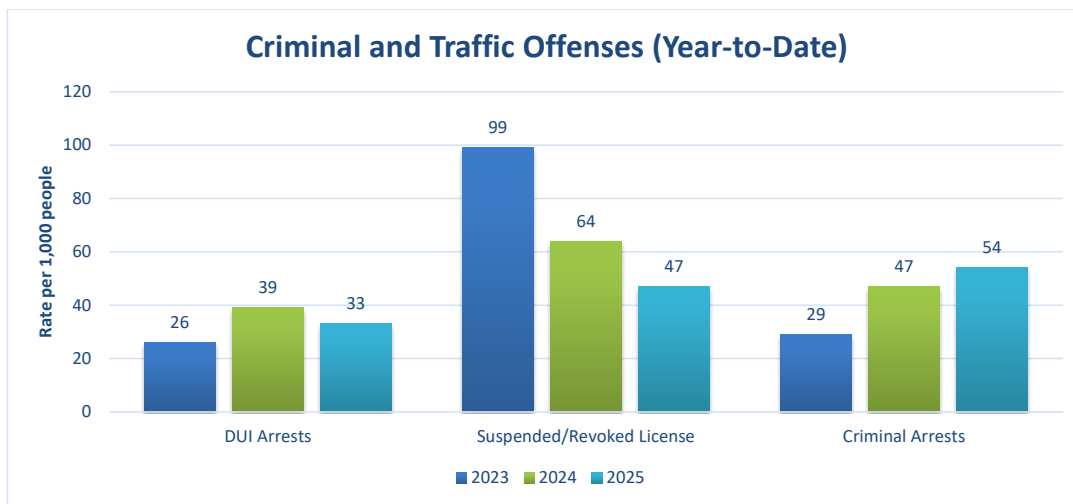
Illinois passed new cannabis rules and regulations that went into effect on January 1, 2020. These citations include local ordinance cannabis possession citations, state statute cannabis related citations (includes possession, delivery, paraphernalia, and DUI), and DUI arrests with cannabis as the primary or contributing factor.



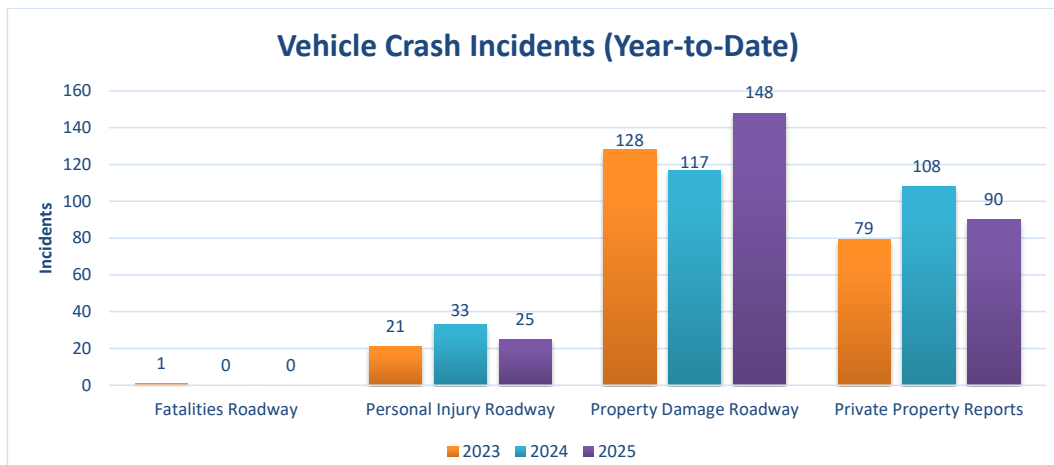
Law enforcement agencies in Illinois are now required to report to the state any incident where a law enforcement officer was dispatched to deal with a person experiencing a mental health crisis or incident. The report shall include the number of incidents, the level of law enforcement response and the outcome of each incident. For purposes of this section, a 'mental health crisis' is when a person's behavior puts them at risk of hurting themselves or others or prevents them from being able to care for themselves.



Information depicted in this graph relates to traffic stops conducted by Department personnel.

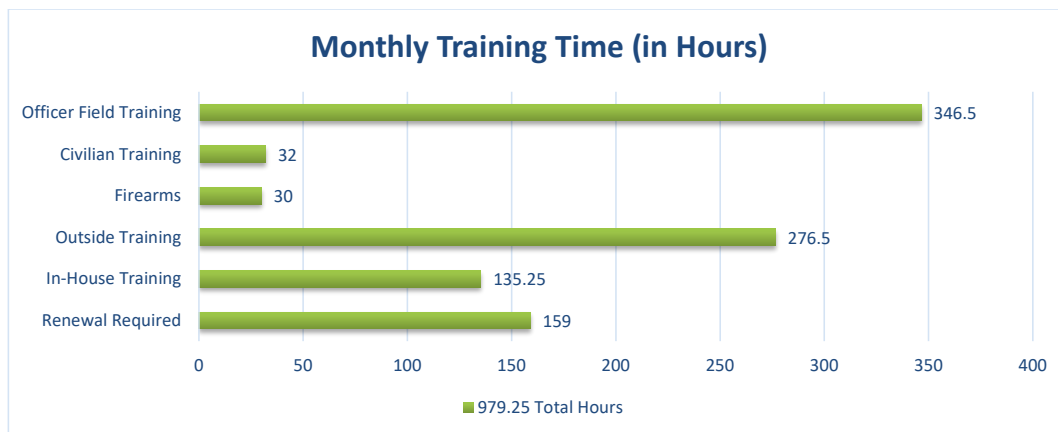


Information depicted in this graph relates to Driving Under the Influence of Alcohol/Drug arrests, Driving while Driver's License Suspended/Revoked arrests, and various criminal arrests (Domestic Battery, Retail Theft, Drug Offenses, etc.) conducted by Department personnel.

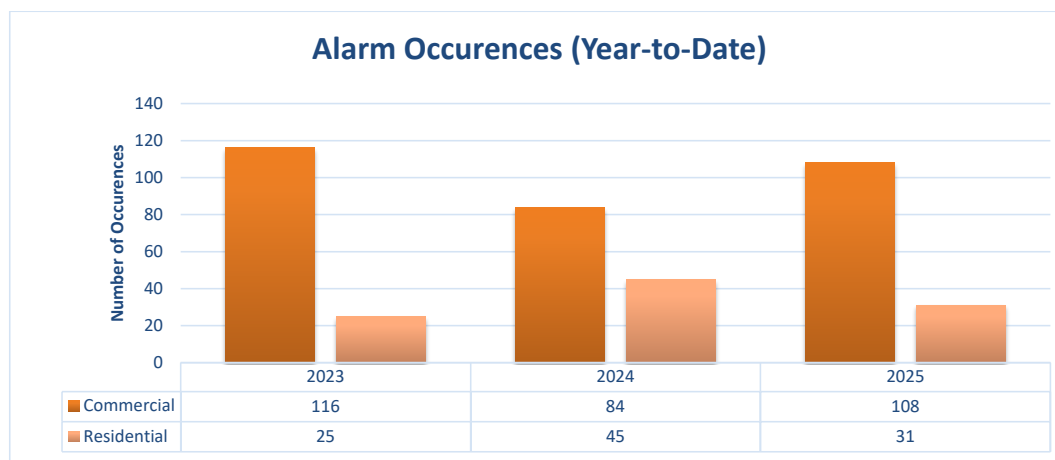


The Department conducts traffic crash investigations on both public roadways and private property (primarily parking lots). The traffic crashes are broken down into four categories: fatal, personal injury, property damage, and private property. Routine traffic crashes are taken by Patrol personnel. Traffic Safety personnel investigate fatal, serious personal injury, and commercial motor vehicles.

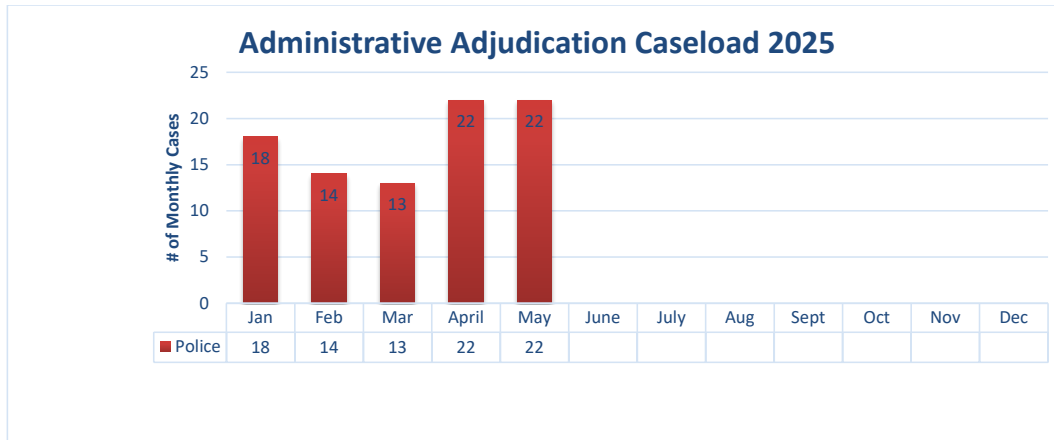




Training is an important element to maintain or improve skills/knowledge/ability. The main categories of training include field training, chief's training, civilian training, firearms training, outside agency training, in-house training, and renewal required training.



The records department monitors the number of alarms to which Patrol personnel respond – many of the alarms are false.



The Administrative Adjudication process was originally put in place to address automated traffic enforcement citations. This program has been expanded to review vehicle equipment compliance citations, administrative tows, and parking citations.

### Red Light Camera Violations and Accidents (Year-to-Date)

2025	Red Light Violations		Adjudication for Red Light Violations				Accidents at Red Light Intersections		
	Citations	Net Received	Hearings	Liable	Not Liable	Non-Suit	12/ Miller Road	12/ Route 22	12/ June Terrace
January	175	\$14,500	2	2	0	0	1	2	1
February	124	\$10,892.50	6	4	2	0	1	1	0
March	85	\$11,875	5	4	1	0	5	1	2
April	100	\$7,075	3	3	0	0	1	5	0
May	75	\$5,600	2	2	0	0	1	3	0
June									
July									
August									
September									
October									
November									
December									
<b>Total</b>	<b>559</b>	<b>\$49,942.50</b>	<b>18</b>	<b>15</b>	<b>3</b>	<b>0</b>	<b>9</b>	<b>12</b>	<b>3</b>

Information depicted in this chart relates to red light camera violations, adjudication (court) for those contesting their violation, and accidents that have occurred at intersections with red light cameras.



# PARKS & RECREATION DEPARTMENT

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## MONTHLY INFORMATION REPORT

**May 2025**

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HIGHLIGHTING DATA METRICS  
TO IDENTIFY OPERATIONAL TRENDS  
AND  
FACILITATE INFORMED DECISION MAKING

70 E. MAIN STREET  
LAKE ZURICH, IL 60047

### Departmental Narrative

The Academy of Performing Arts (APA) held their Spring recital, Elysium, at Wheeling High School on May 3<sup>rd</sup> (showtimes are 9am, 11am, 1pm, 3pm and 5pm). Our 300 dancers performed over 70 dances showcasing choreography in a variety of dance genres. A big thank you to our Dance Coordinator Mollee Johnson and her team of instructors- Jen Rowley, Gillian Suchecki, Kristine Blitek, Morgan Alverson, Sol Fernandez, Reggie Good, Emily Mejicano-Gormley, and Jenna Simpson- for all their dedication, hard work and passion for the program and participants. Below is feedback from an APA parent regarding their experience in the newly offered special needs dance program, Empower Dance:

*Hi Mollee,*

*Our family is sending a little note with a lot of gratitude for the first season of Empower Dance that Willow was a part of at APALZ. This was Willow's first dance experience and she loved every minute of it and thrived under Ms. Reggie's instruction. She made new great friends, she learned how to collaborate with others, she memorized and put into action dance steps, she grew in confidence and had the recital performance of a lifetime that we will remember forever. There are two things that come to mind as we look back at our dance experience and look ahead to the fall....*

*As a special needs family, there are not that many things that come easily to participate in and we typically have many hoops to jump through, extra supports to advocate for, ideas that don't match up but we did not experience this being involved with your dance studio. What a gift to have Ms. Reggie as our instructor and Sam & Naomi as "buddies" who each were so welcoming, accepting, celebrating and cheering every step of the way. Thank you for so many different things that may have seemed small but were big to us: allowing the parents to come into the studio to help connect our kids together, sending videos of the dance steps before recital, engaging in such personal ways during class time, preparing our costumes and providing makeup (GLAM TEAM!) And of course, the recital itself was over the top inclusive and celebratory with how the company and audience cheered our kids on during their performance....even my husband had tears that day!*

*As parents, we are so thankful to have something for Willow where she is surrounded by peers that enjoy her as much as she enjoys them. You have created a dance experience that embraces and champions all abilities while also building confidence to learn new skills and grow in friendship with peers. Thank you for taking an opportunity to provide something new this year in Lake Zurich as you have made such a difference in our family's life by doing so.*

*Would you please pass this on for me to share our appreciation with Reggie, Sam and Naomi...thank you again! - Amy Goodman - Willow's mom*







Our Yellow Brick Road Program has 36 new graduates! Graduation for our 4-year-old program was held at Buffalo Creek and the Paulus Park Barn on Friday, May 23<sup>rd</sup> for family and friends. Thank you to the teachers, assistants and aides who are dedicated to providing a safe and caring environment that sets the stage right for a child's journey of learning. Registration for the 2025-2026 school year is ongoing as well with limited availability only at our Buffalo Creek location for 4-year-old preschool and Paulus Park Barn location for the 2-year-old program.

Our day camp team is still busy preparing for camp to begin the week of June 9<sup>th</sup>. The department is working on organizing facilities and equipment, communication to camp families, camp balance collections and prepping for orientation set for the week of June 2<sup>nd</sup>.

Paulus Park and Breezewald Beaches officially opened for the season on Thursday, May 29<sup>th</sup>, following a slight delay from the usual Memorial Day opening weekend due to cooler temperatures. Regular Season Hours (Daily June 2<sup>nd</sup> – August 3<sup>rd</sup>): Paulus Park: 11am-7pm and Breezewald Beach: 12-7pm. Orientations for the aquatics team took place over the course of the past two weeks; thank you to our Police Department, Fire Department and SRACLC for attending one of our weekly aquatics inservice trainings to provide more specific training (disability awareness and behavior management, dive lines, etc.). The American Red Cross Lifeguard training will be conducted from May 30<sup>th</sup> to June 2<sup>nd</sup> for 20 newly hired staff. The training will be led by our certified Lifeguard Instructors, who also serves as our Aquatics Coordinator and Manager. The popular Wibit inflatables will return to Paulus Park starting June 17<sup>th</sup>. Due to staff availability, the inflatables will be open the same hours as last season, Monday through Friday, 12-5pm. The department did contract with McCloud Aquatics again this season for weed treatments at the Paulus Park Beach areas which took place the week of 5/19/25. Staff noticed an abundance of milfoil growth while prepping for the season. The FY25 budget did include dollars to support continued weed treatment at our beaches; treatment came in under budget.

The Key Parks Master Plan task force invited their preferred firm to Village Hall on Wednesday May 14<sup>th</sup> to present their proposal. The team was able to get a better orientation to the firm and ask specific questions regarding the process and proposal. At the conclusion, the present members of the task force unanimously voted to move forward with recommending Upland Design Ltd.'s proposal to the Village Board. The department anticipates this to appear on the June 16<sup>th</sup> Village Board meeting agenda. Upland Design Ltd. will be present to meet the Village Board and available for any questions.

Hitchcock Design Group has submitted permit information to our Community Development Department and should be receiving the necessary permits to move forward by the end of the month. Stuckey Construction has informed staff that delivery of the bandshell structure from the manufacturer, Poligon, has been delayed. Installation is now expected in late August or early

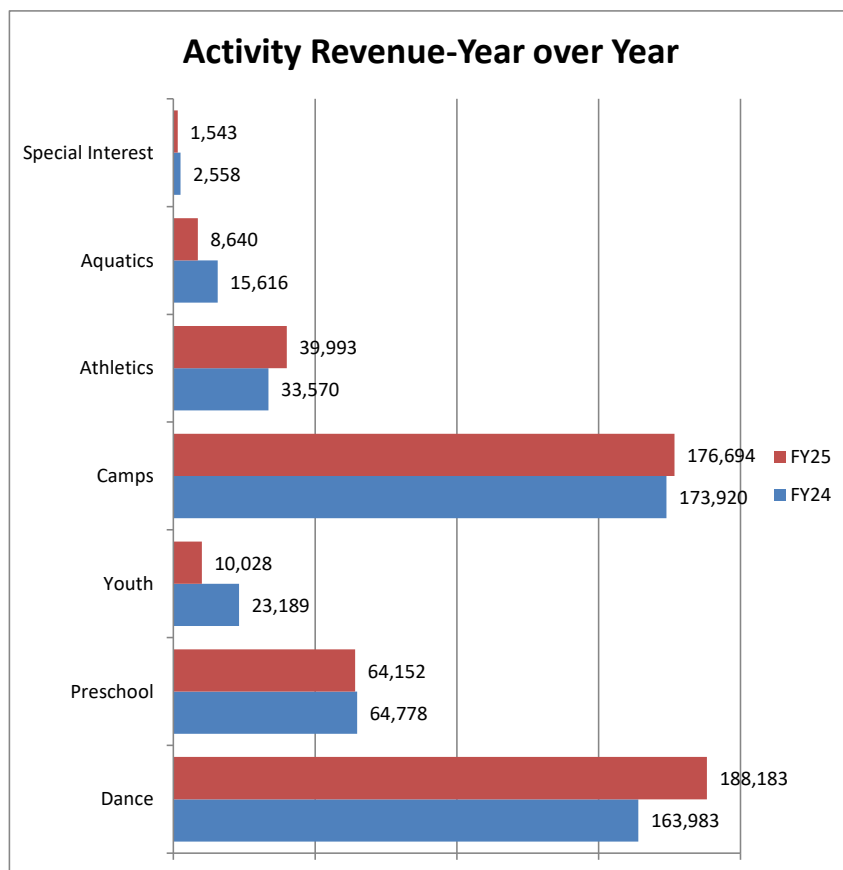
September. The original plan was to have the bandshell completed in time for the July 4th celebration and the Live at the Lake event on August 7. Due to the delay, the Live at the Lake event has been canceled. In the meantime, Stuckey Construction will adjust their schedule and begin work the first week of June on several other OSLAD-funded improvements, including: splash pad, baggo courts, shoreline restoration, and Northern outcropping. Site preparation for the bandshell, including footing installation, is planned to begin after the Lake Zurich Triathlon on July 14th.

In addition to the OSLAD projects, the department is continuing to work with the Public Works team to complete a variety of projects including Bristol Trails basketball court renovation and Breezewald Beach retaining wall renovation (to begin after the beach closes). Projects finished this month in time for the warmer weather include: Paulus Park Wibit staff hut, landscaping at the Buffalo Creek facilities, Adirondack chair with Village logo at Paulus Park for photo opps, Paulus Park Barn signage and park pet waste station.

The Water Lantern Festival returned to Paulus Park on Saturday, May 17<sup>th</sup> from 5:30-9:30pm and saw 3,896 ticket purchases come out to enjoy the 2<sup>nd</sup> annual event. Tickets were down compared to last year's number attendance number of 5,013. The potential reason for the decrease is that attendees may have decided to purchase less lanterns for participation in the fest (options are to individually purchase or purchase 1 for the family). In line accordance with our external special event policies and procedures, the Water Lantern Festival will reimburse the Village for, in addition to their 2.5% gross ticket sales park fee (approximately \$3,000), the Police Department, Fire Department and Public Works Department staffing/equipment add-ons. The event operations were smooth this year with nothing significant noted for future occurrences. The Water Lantern Festival has already conveyed their desire to return to Lake Zurich next year.

The department is preparing for the Lake Zurich Farmers Market to kick off the 2025 season on Friday, June 6<sup>th</sup> at Paulus Park. The market will be open every Friday from 3-7pm through September 12<sup>th</sup>, featuring a diverse selection of vendors. This season brings an exciting change: with the market now located inside the park grounds, we've expanded to welcome even more vendors than before! You can view the full list of this year's participants here: [lakezurich.org/477/This-Years-Vendors](https://lakezurich.org/477/This-Years-Vendors) In addition to fresh produce and local goods, the market will offer live entertainment, hot food vendors, adult beverages, and rotating weekly booths with kids' activities, pet rescues and local artisans. Stay up to date with all the latest happenings by reading our new weekly newsletter, The Green Gazette, available via Benchmarks and shared on our Facebook page. A big thank you to our generous event sponsors: Jim and Kathy Iverhouse, Lake Zurich Tire and Auto Inc., Renewal by Andersen, Prime Bath, and Martin Enterprises Heating and Air Conditioning.

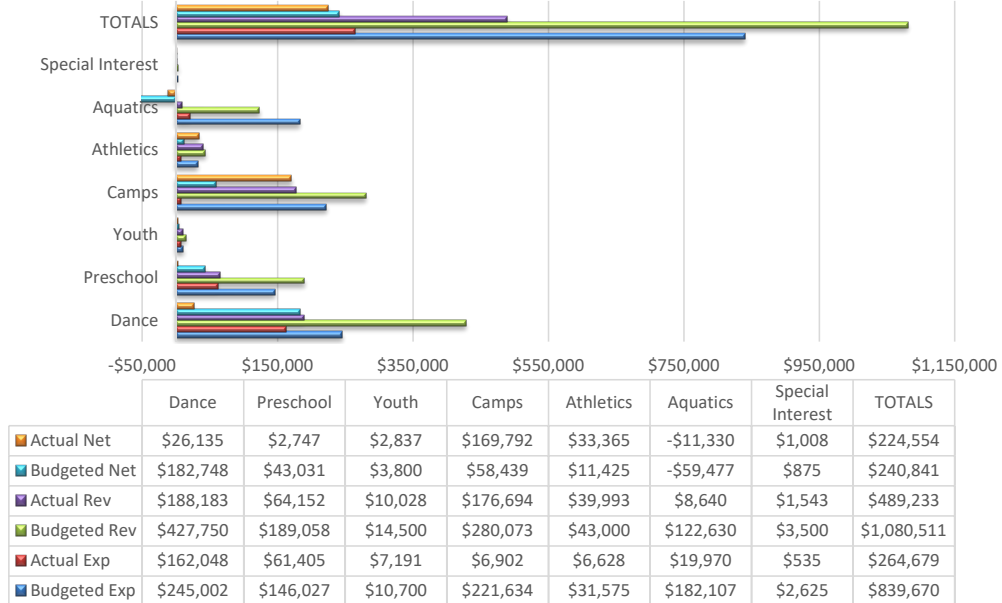
External special event partners with approved applications to operate for the remainder of the year include: Jack O Lantern World, Phase 3 Bushel of Apples Fest, LZ Tri, Unplugged Fest, Alpine Races, Worship on the Water, Gigi's Playhouse 5K, Fishing Derby and My Density Matters October fundraising walk. Further details on both Village sponsored, external and internal events can be found in our seasonal program brochure, online or by contacting the department.



\*FY 25 Youth Revenue is down due to the loss of a popular youth contractor, Cricket Theatre, which was budgeted.

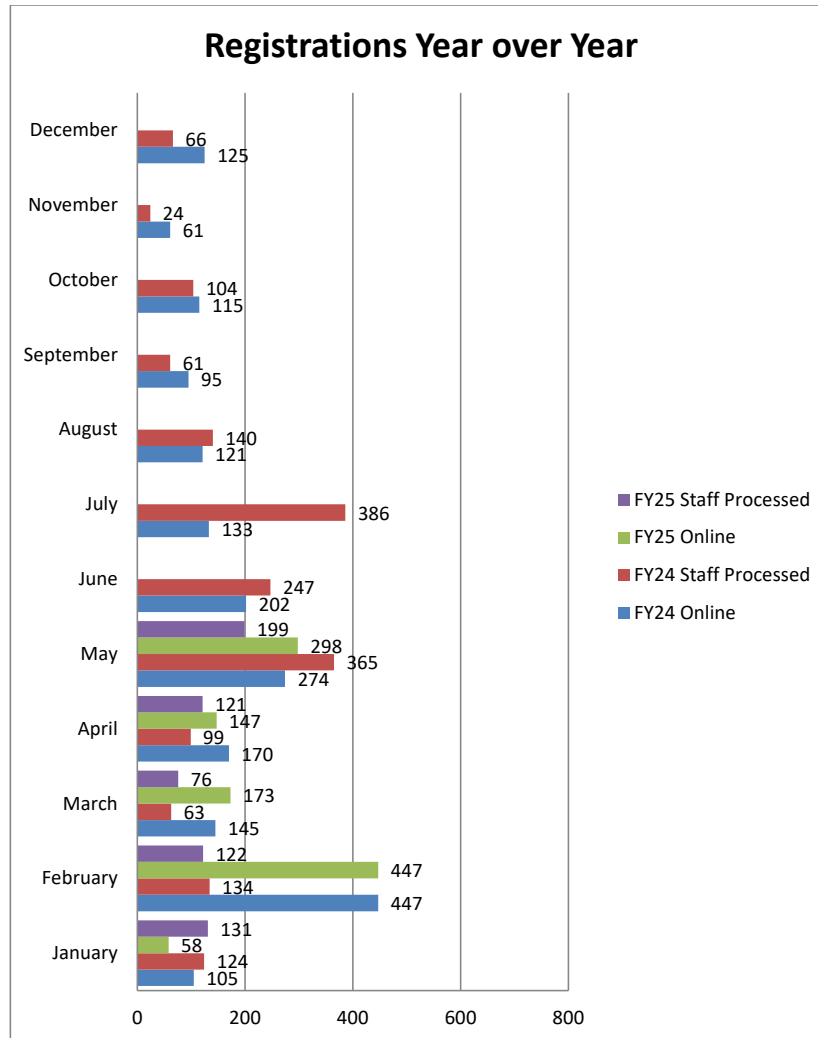
Reported revenue is only thru 5/15.

### Program Cost Recovery Fiscal Y-T-D



Reported revenue is only thru 5/15.





Online registration is available to all residents and non-residents enrolling in programs. Beach membership and facility rentals must be made in person at the Paulus Park Barn. Payments made at the beach are NOT included in these numbers. February registrations reflect the priority resident registration period for camp deposits/payments and July registrations reflect the priority registration period for returning dancers for the Fall/Winter season.



# FIRE DEPARTMENT

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## MONTHLY INFORMATION REPORT

**May 2025**

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HIGHLIGHTING DATA METRICS  
TO IDENTIFY OPERATIONAL TRENDS  
AND  
FACILITATE INFORMED DECISION-MAKING

321 S. BUESCHING ROAD  
LAKE ZURICH, IL 60047

70 E. MAIN STREET  
LAKE ZURICH, IL 60047

## Departmental Narrative

**OUR MISSION:** To care for and protect our community.

**OUR VISION:** The Lake Zurich Fire Department is dedicated to meeting the ever-changing needs of our community, while ensuring a safe and secure environment for all, through professional development, unity, and teamwork.

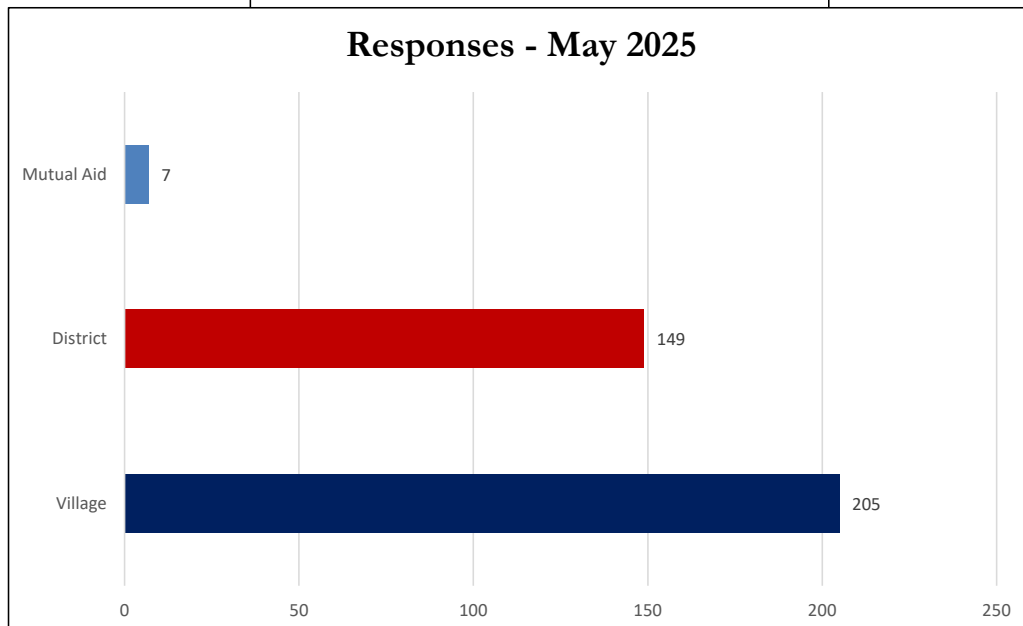
**OUR VALUES:** Professionalism, Responsibility, Integrity, Dedication, Honor

## EXECUTIVE SUMMARY – May 2025

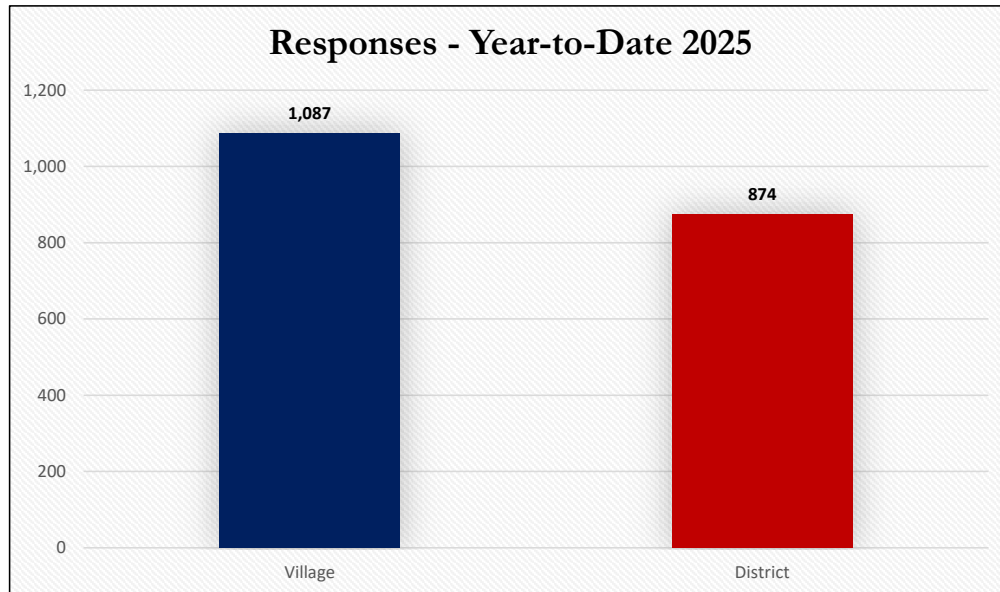
The Lake Zurich Fire Department provides a full range of professional and high-quality services to the Village of Lake Zurich and the Lake Zurich Rural Fire Protection District. We protect approximately 37,000 residents, many local businesses, and visitors across the twenty-five square mile combined service area. The Villages covered in the fire district include Hawthorn Woods, Kildeer, Deer Park, North Barrington, and Lake Barrington.

**361** Incidents – May 2025

### Responses - May 2025



### Responses - Year-to-Date 2025



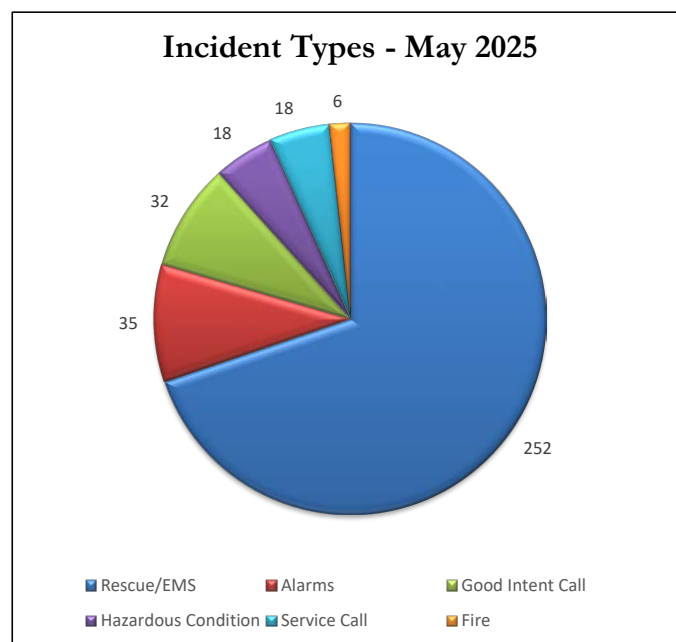
### Incident Types

The Department codes all incidents within the National Fire Incident Reporting System (NFIRS).

The codes all relate to the text categories noted in the chart to the right. Rescue and EMS incidents account for the majority of incidents we respond to.

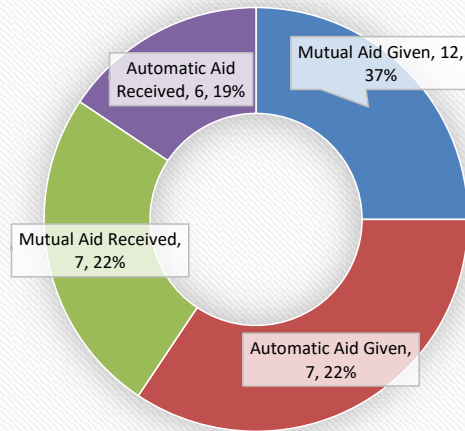
In May, there were **252** Rescue and EMS incidents.

### Incident Types - May 2025





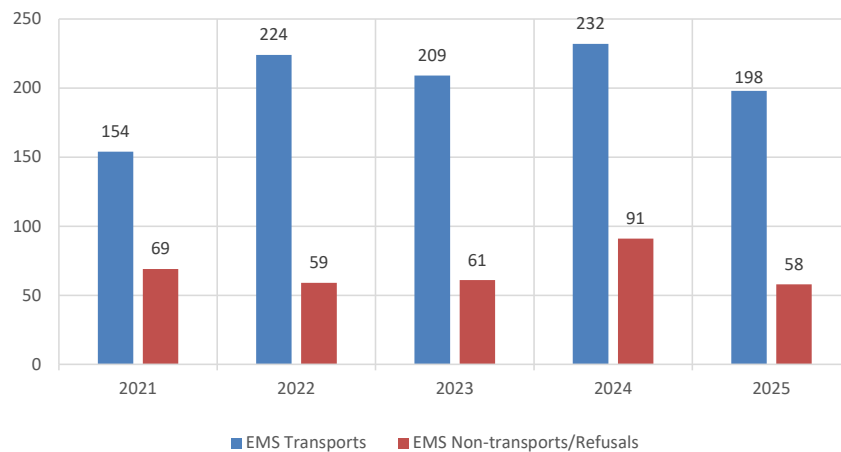
### Mutual Aid - May 2025



### EMS Incidents

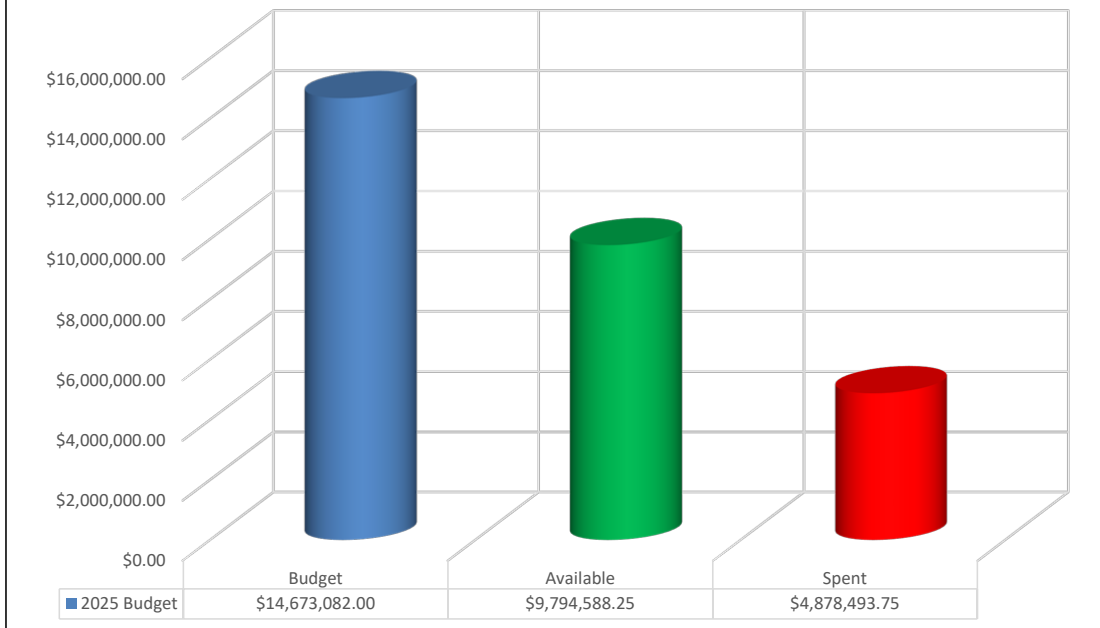
The chart shown below reflects EMS Transports vs. Non-Transports/Refusals. It's important to note that not every EMS call will result in transport to the hospital. However, as you'll see from the data, transports always outpace Non-Transports/Refusals. The chart below compares the month of May across 5 years.

#### EMS Transports vs Non-Transports/Refusals Monthly Comparison



## ADMINISTRATION DIVISION

### 2025 Budget - 05/31/2025



The Department processed 7 FOIA requests during May.



*(Pictured above)* In May, the Lake Zurich Fire Department honored the retirements of two outstanding members of the Lake Zurich Fire Department family, whose combined 64 years of service have made a lasting impact on our department and community. Captain Kammin (left) retires after 28 years of dedicated service. Known for his strong work ethic, teamwork, and good-natured spirit, he has been a valued presence and role model within the department. Deputy Chief John Kelly (right) retires after 36 years with the department. His steady leadership, commitment, and professionalism have been instrumental to our growth and success. We are deeply grateful for their decades of service and wish them both the very best as they begin thie next chapter.



*(Pictured above)* In May, the Lake Zurich Fire Department hosted the annual CERT Pancake Breakfast at Station 1! It was great to see so many members of the community stop by to enjoy breakfast, meet everyone, and even say hello to Sparky! A big thank you to our dedicated Explorers for lending a hand throughout the event – we appreciate your help in making it a success!



*(Pictured above)* In May, the Lake Zurich Fire Department swore in Brian Stodola to the rank of Fire Lieutenant. Brian has served with dedication and professionalism in his role as Firefighter/Paramedic, and we are proud to see him take this next step in his career. Congratulations, Lt. Stodola!



## STATIONS & STAFFING | OFFICER & FIREFIGHTER/PARAMEDIC

### STATION 1

321 S. Buesching Road  
Lake Zurich, IL 60047

#### APPARATUS & STAFFING BATTALION 32



ENGINE 321  
AMBULANCE 321



### STATION 2

350 W. Highway 22  
North Barrington, IL 60010

#### APPARATUS & STAFFING

ENGINE 322  
AMBULANCE 322



### STATION 3

1075 Old McHenry Road  
Lake Zurich, IL 60047

#### APPARATUS & STAFFING

ENGINE 323  
AMBULANCE 323



### STATION 4

21970 Field Pkwy  
Deer Park, IL 60010

#### APPARATUS & STAFFING

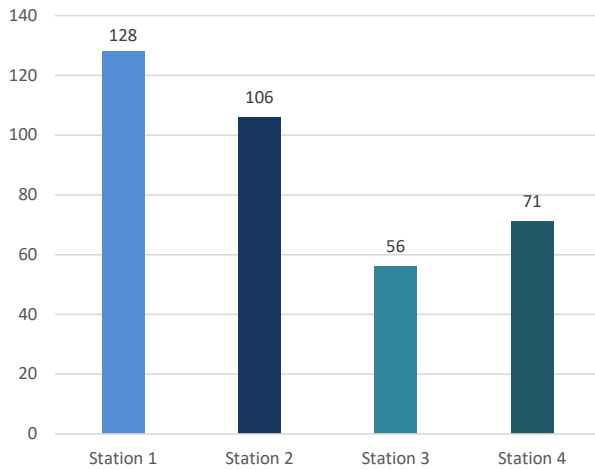
ENGINE 324  
AMBULANCE 324



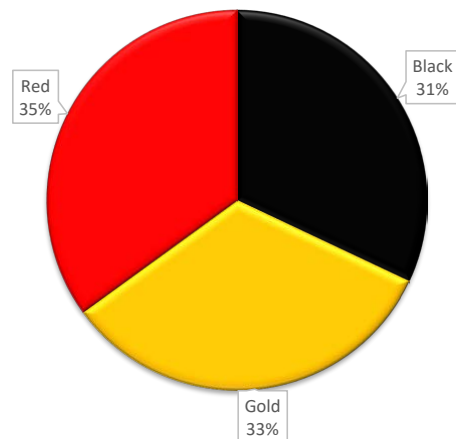


## OPERATIONS DIVISION – May 2025

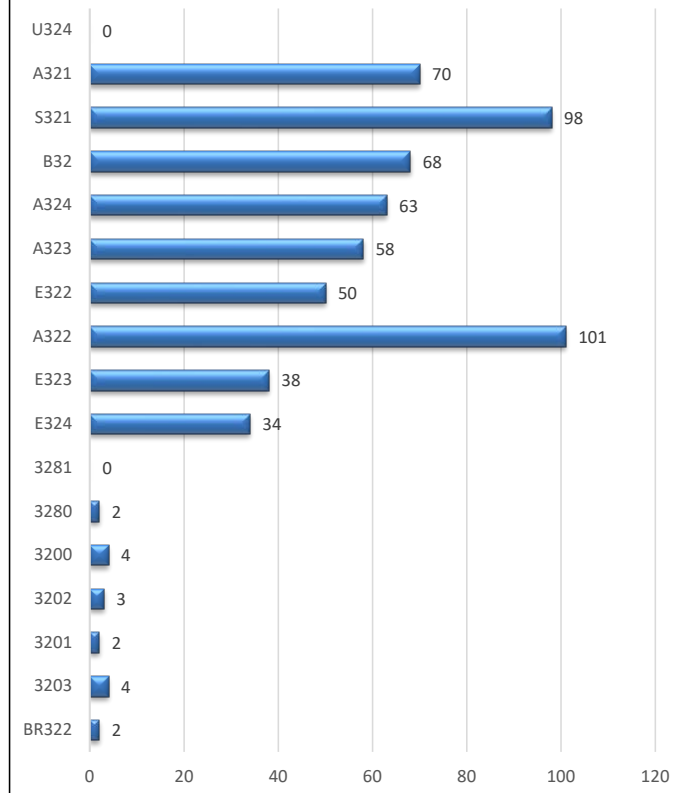
Incident Count by Station



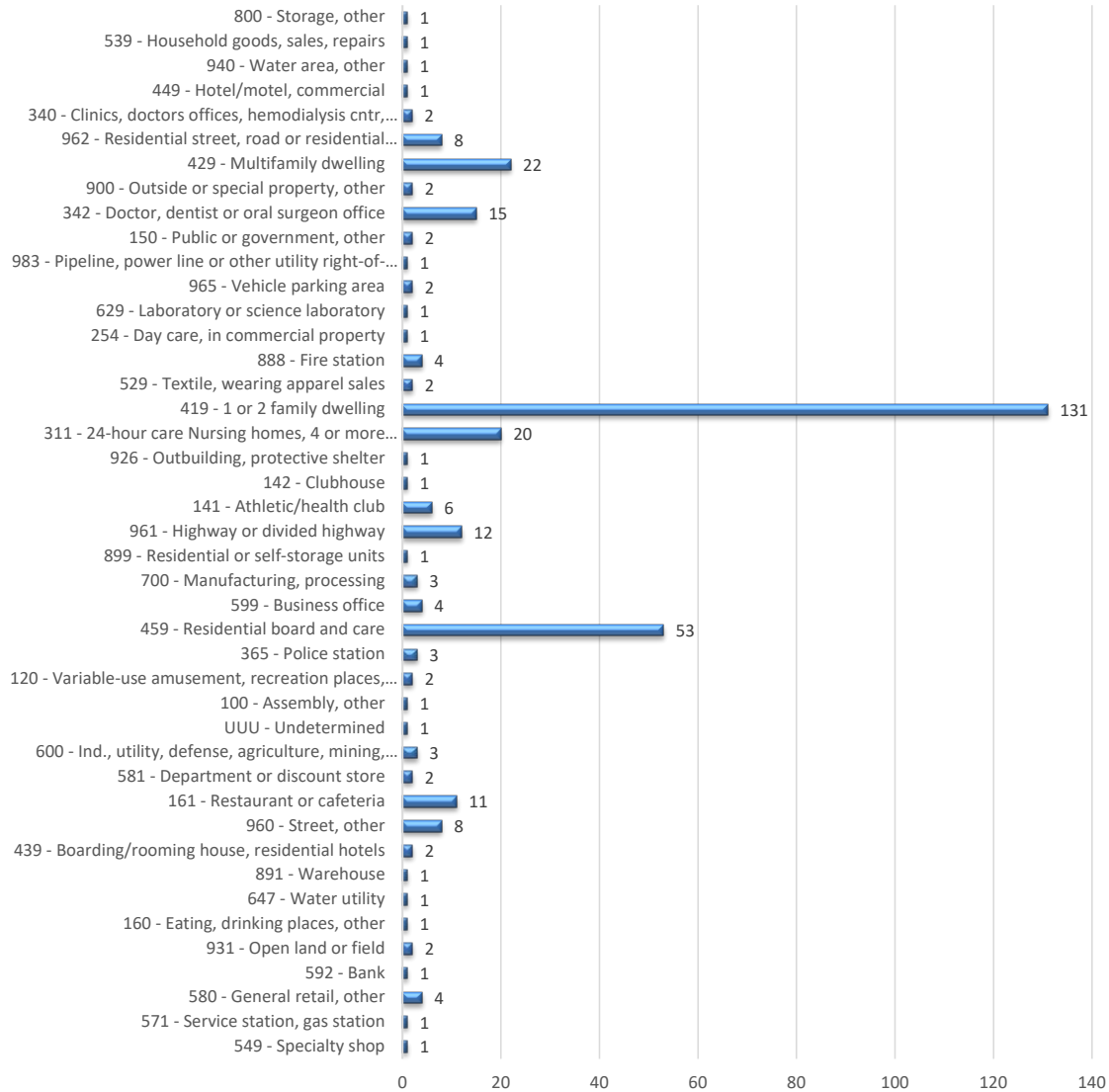
Incident Percentage by Shift

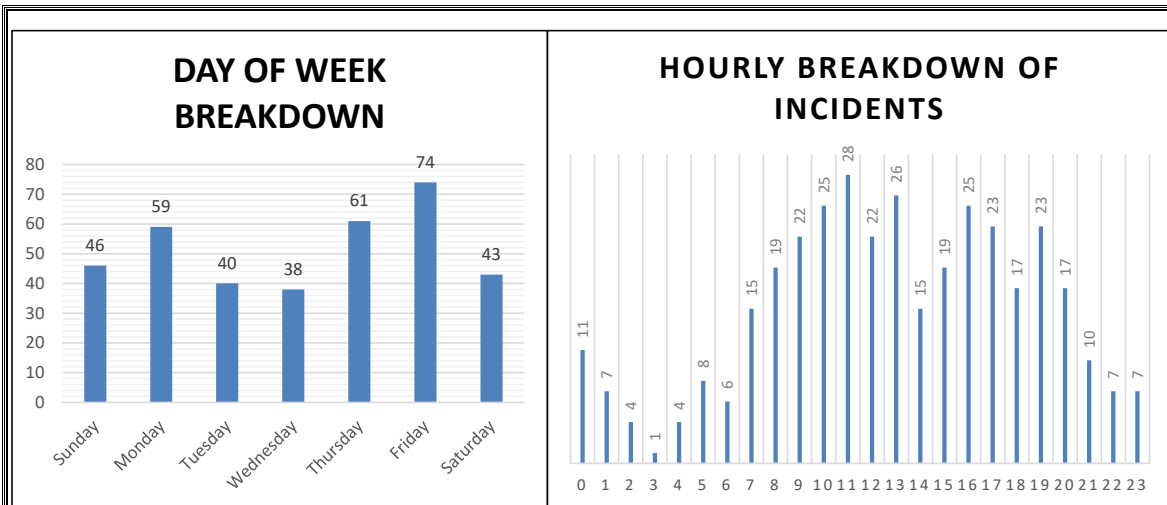


Incident Count by Unit



### Incidents by Property Type - May 2025





## Emergency Response Times

Response time includes three key factors: **dispatch handling, turnout, and travel time.**

Dispatch handling time is when dispatch takes in information and then dispatch personnel. The turnout time is when the crews receive the call, enter the vehicles, and initiate their MDT en-route command. Travel time reflects the time from en route to when they arrive at the incident scene. Construction, speed limits, weather, and train traffic can impact response times. The overall goal for arrival at an emergency fire call is 6 minutes and 20 seconds from notification until the first unit arrives. For a response to an EMS incident, this time is 6 minutes.

The following shows the average times for all emergent incidents, with arrival on the scene for EMS and fire within the local response area minus Mutual Aid in May 2025. *(With the new CAD software, times are off due to transfers to RMS)*

Dispatch Time	Turnout Time
Average Dispatch Time <b>1 MINUTE, 25 SECONDS</b>	Average Turnout Time <b>1 MINUTE, 3 SECONDS</b>
Travel Time	Response Time
Average Travel Time <b>4 MINUTES, 9 SECONDS</b>	Average Response Time <b>5 MINUTES, 37 SECONDS</b>

## TRAINING DIVISION

### Summary

The Training Division delivered a high-impact training month in May 2025, combining both in-house and outside training initiatives. A total of 1,832.50 training hours were logged across all shifts, showcasing our department's continued commitment to operational readiness, professional development, and firefighter safety. Strategic use of external training resources and on-duty opportunities contributed to advancing individual competencies and department-wide capabilities.

### Outside Training Highlights

The department supported the participation of several members in specialized external training courses. These sessions provided advanced instruction in key operational areas, leadership development, and specialty rescue techniques. Attendees are expected to bring this knowledge back to their crews to enhance shift-level proficiency and cross-training.

Course	Attendees
Advanced ASIM	Booth
Incident Safety Officer	Michehl, Bene, Stodola, Campbell, Penkava, Brooks
Fireground Company Officer	Johnson
Advanced Technician Firefighter	Munoz, Bartoli, Portillo
RIT Chief	Yee
VES – FOOLS Half Day	Stodola, Tanner, DeBoer
Explorers Live Fire Support	Stodola, Corral
Trench Operations	Justin Kenyon

### On-Duty Training Overview

The following training blocks were delivered on-duty, emphasizing consistency across all three shifts while aligning with ISO, NFPA, and OSFM standards:

#### Fire Training

- Fire Extinguisher/Search Can Operations
- 2.5" Hose Deployment Drills
- TIC Rescue Practical Scenarios
- NFPA 1021 – Community Awareness Discussions
- Vehicle Machinery Operations: Stabilization
- Live Fire Evolutions at Wauconda Cans Site

#### EMS Training

- Burn Management: 2nd & 3rd Degree Burns
- Pharmacology Review: Ipratropium & Ketamine
- NWCH Monthly Continuing Education



### Special Rescue Training

- Water Rescue Operations
- FAE 1410 #12: Reverse Lay from Sprinkler Connection

### Health and Safety

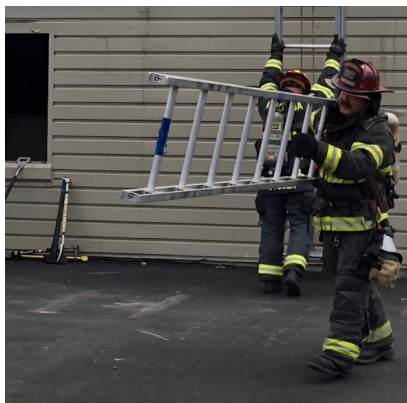
- Daily Physical Fitness
- Redline PPE Cleaning and Cancer Prevention Compliance

### Administrative Tasks

- Ground Ladder Inspections and Checks
- Probationary Firefighter Evaluations and Task Book Reviews

### Conclusion

May 2025 marked a month of measurable professional growth across all disciplines. By leveraging both external training opportunities and internal instructional efforts, we continue to develop a well-rounded, prepared, and progressive firefighting force.



## FIRE PREVENTION BUREAU

### Annual Fire Inspections:

The Fire Prevention Bureau conducted 92 Annual Property Inspections in May.

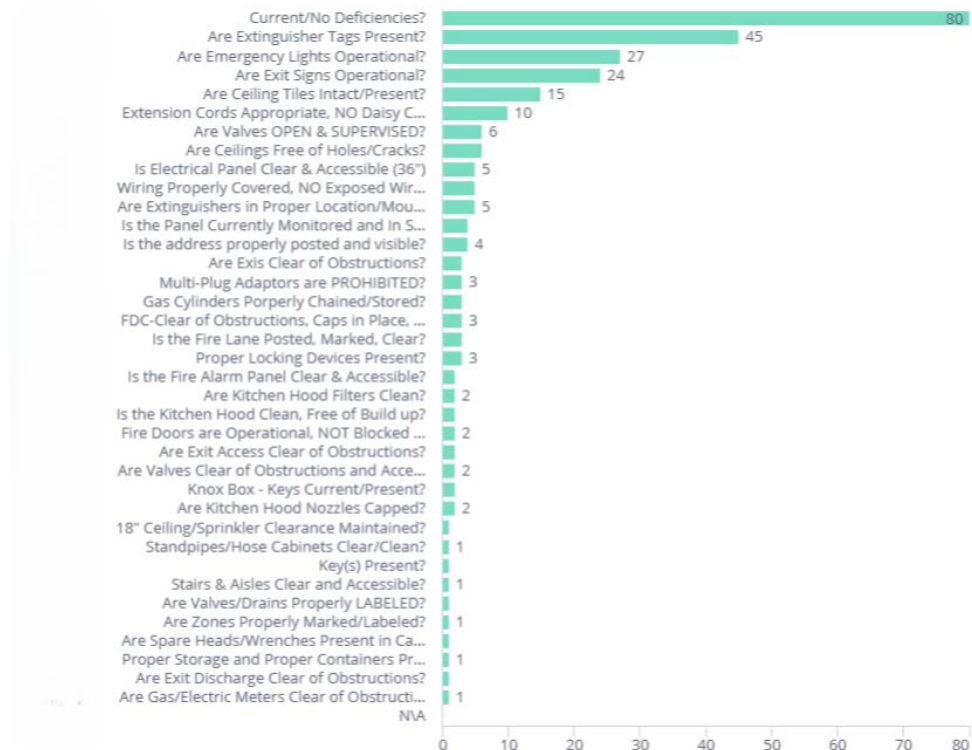
### Re-Inspections:

145 Annual Re-Inspections

**Violations: 280**

**Cleared Violations: 47**

Count of Violations by Firecode copy



### Inspections, Tests, and Fire Alarm/Sprinkler Follow-Ups:

26 Fire Alarm System Follow-ups

9 Sprinkler System Follow-ups

### Meetings and Other Activities:

5/1/2025 – Water Flow Test at 20338 Rand Road Deer Park for the New Development.

5/6/2025 - Fire Evacuation Drill at 200 Church Street May Whitney – 120 Staff, 11 Students. (No issues noted).

5/7/2025 – NIFIA meeting at Mundelein Fire Station #1 – Training topic: Knox company - remote & secure way to shut off power to EV charging stations.

5/12/2025 –Command Staff Meeting at LZ Fire Station One.

5/17/2025 – Set up and participation at the Gurnee Fire Expo in Gurnee Mills.

5/17/2025 – Food truck and vendor inspections at Paulus Park for the water lantern festival.

5/21/2025 – Monthly DRT Meeting.

5/22/2025 - Fire Pump Test at 130-150 Oakwood Lake Zurich – PASS.

5/22/2025 - Fire Pump Test at 230 Oakwood Lake Zurich – PASS.

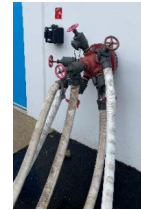
5/23/2025 – Fire Pump Test at 21440 W. Lake Cook Road Deer Park – PASS.

5/23/2025 – Training at Palatine Village Hall – (Navigating the Fire Alarm Plan Review and Documentation Process).

5/24/2025 – Fire work display inspection at Concord Banquets 20922 N. Rand Road Kildeer – PASS.

5/29/2025 – Training Seminar at Round Lake Civic Center – (Electric Vehicle & Lithium Battery Fires).

5/29/2025 – Teams meeting at 505 Telser Road for the potential new development.



**Plan Reviews:** The FPB completed 16 plan reviews, taking 29 plan review hours.



# PUBLIC WORKS DEPARTMENT

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## MONTHLY INFORMATION REPORT

**May 2025**

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HIGHLIGHTING DATA METRICS  
TO IDENTIFY OPERATIONAL TRENDS  
AND  
FACILITATE INFORMED DECISION MAKING

505 TELSER ROAD  
LAKE ZURICH, IL 60047



DEPARTMENTAL NARRATIVE

**Park Maintenance:** Crews continue to address maintenance items within the parks.

**Special Events:** Crews prepared for and performed clean-up for the CERT Touch a Truck/Pancake Breakfast and the Water Lantern Fest.

**Infrastructure Projects:**

2025 Main Street Beautification / Whitney Rd. & Lake Zurich Dr. Infrastructure

On February 28<sup>th</sup> Bids were opened for this project. 4 Bidders submitted proposals with the apparent low Bidder being Copenhaver Construction. Their documents and references are being reviewed. The contract with Copenhaver Construction of Gilberts, Ill has been approved by the Village Board. Pre-construction meetings were held with Public Works and Manhard Consulting.

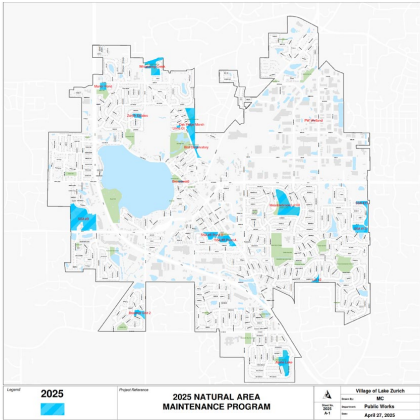
Copenhaver has begun water main and sanitary main replacement on Whitney. All mainline water main has been installed on Whitney and Lake Zurich Drives. Crews are running services to connect homes to the new main.

Concrete removal and replacement continues on Main St. with crews moving East from Lakeview towards Old Rand Rd.

Installation of brick crosswalks and brick center median walls continues from Mionske Rd. to lakeview Pl.

2025 Natural Area Maintenance Program

Staff met with Bluestem Ecological Services and maintenance began in April. This year's program includes 16 locations.



2025 Lane Marking Program

The 2025 lane marking began in April and is scheduled to be completed by the end of June.

2024 Police Department Gun Range HVAC Improvements

Project has been completed.

2024 Buffalo Creek Bank Stabilization

ILM has finalized this project. This project has won 2 awards for Environmental Project of the Year- less than \$5 million from APWA Lake Branch as well as APWA Chicago Metro Chapter.

ILM will perform maintenance and monitoring of the site for 5 years.

Main St. Promenade Improvements

Work has been suspended due to the winter weather. The 2 large circles at either end of the Promenade have been secured and made accessible for the winter months. In the Spring C.R. Schmit will return and finalize installation of the PaverArt designs in the circles.

CR Schmit has installed the PaverArt bricks in the north and south circles leading on to the Promenade.

Punchlist items to be addressed soon.

2025 Paulus Park OSLAD Improvements

A pre-construction meeting was held in Paulus park with Stuckey Construction of Waukegan, IL.

Stuckey was awarded the contract to perform work after successfully being the lowest bidder.

They will begin to mobilize on site the first and second week of June with work to start after that.

**May Water Main Break Locations:**

Cuba Rd @ Ela Rd

Cuba Rd @ Berkshire Ln

1138 Thornwood Ct

755 S. Rand Rd

2 Russet Cir

**Employee Training:**

All employees attended Confined Space Safety Training.

All employees attended Excavator Training.

**Staff Kudos:**

Terry Brown, Scott Abbott, Tony Holub, and Matt Sikorski.

Recognition for their swift action in sending Jacob White to the hospital during a medical episode.

The concern displayed for their fellow employee garnered the best possible outcome.

**Anniversaries:**

Abbott, Scott May 1, 1999

Brown, Terry May 5, 2003

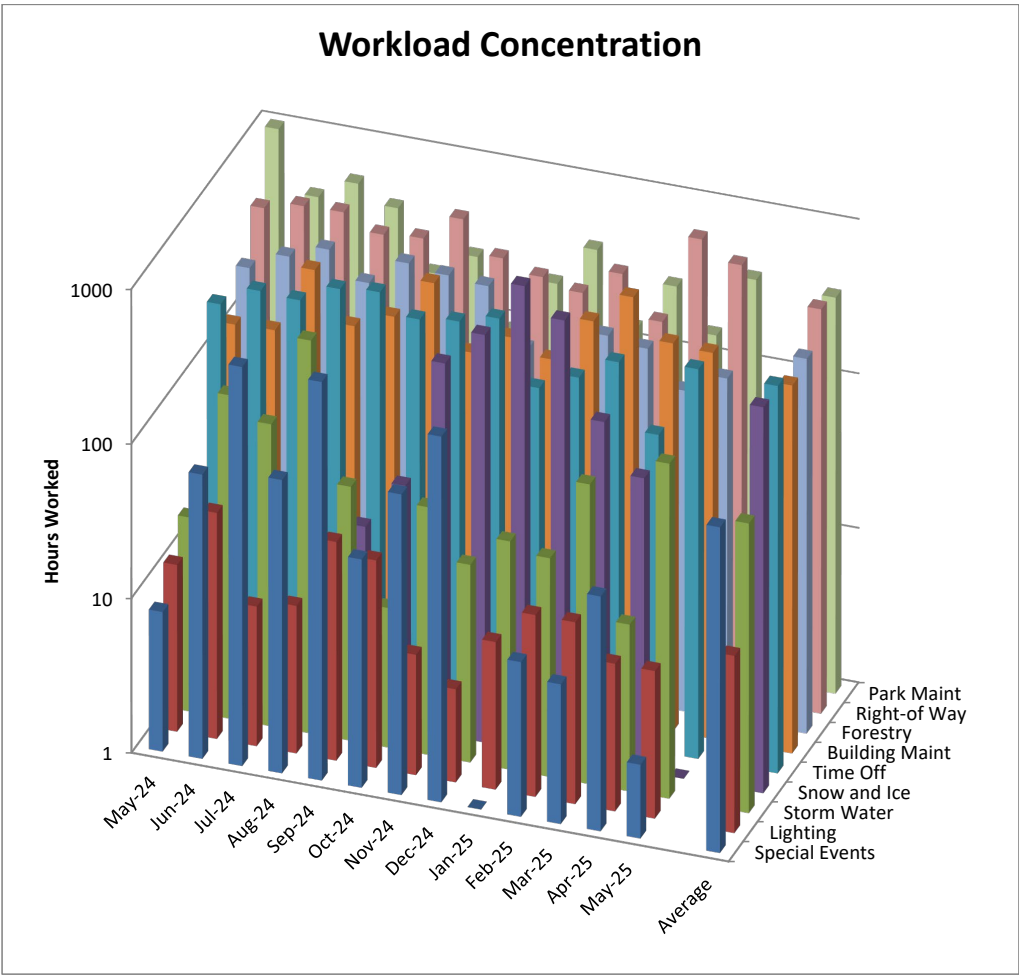
Stefka, Frank May 15, 2016

Cuellar, John May 20, 2002

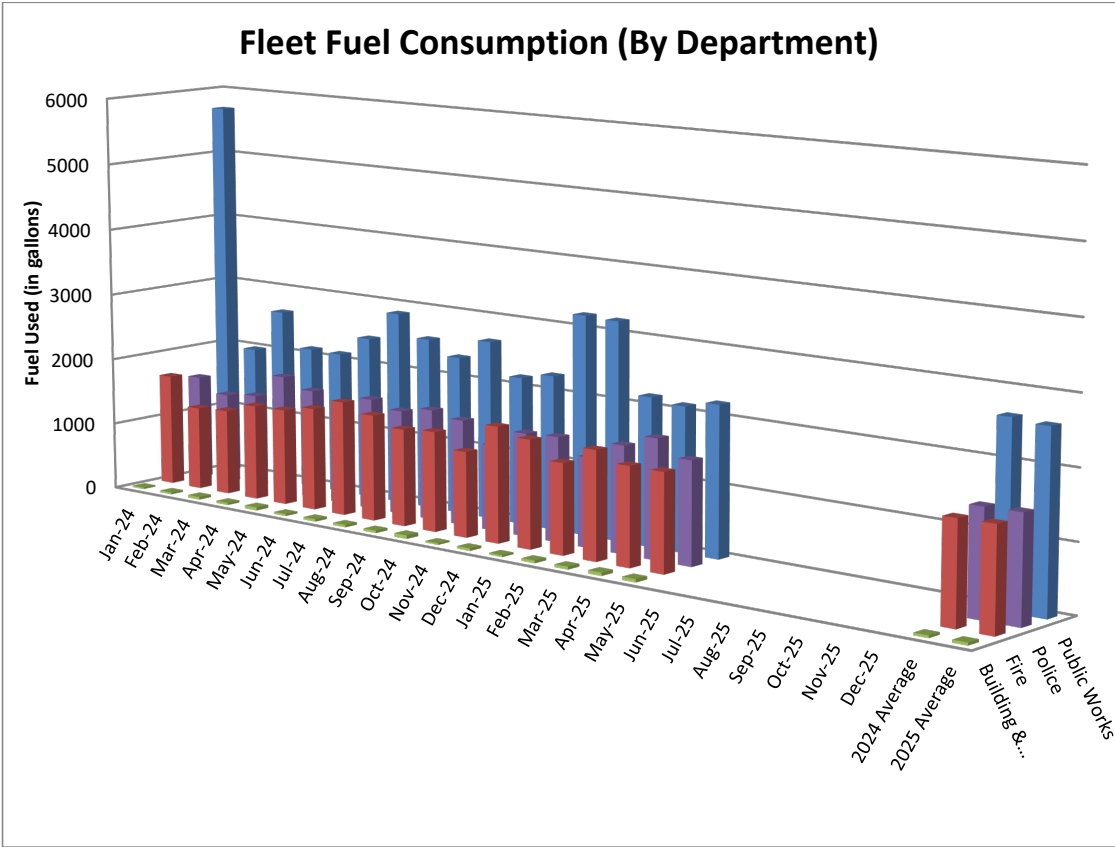
Holub, Tony May 23, 2005

Amato, Keli May 31, 2021

**New Employees:**

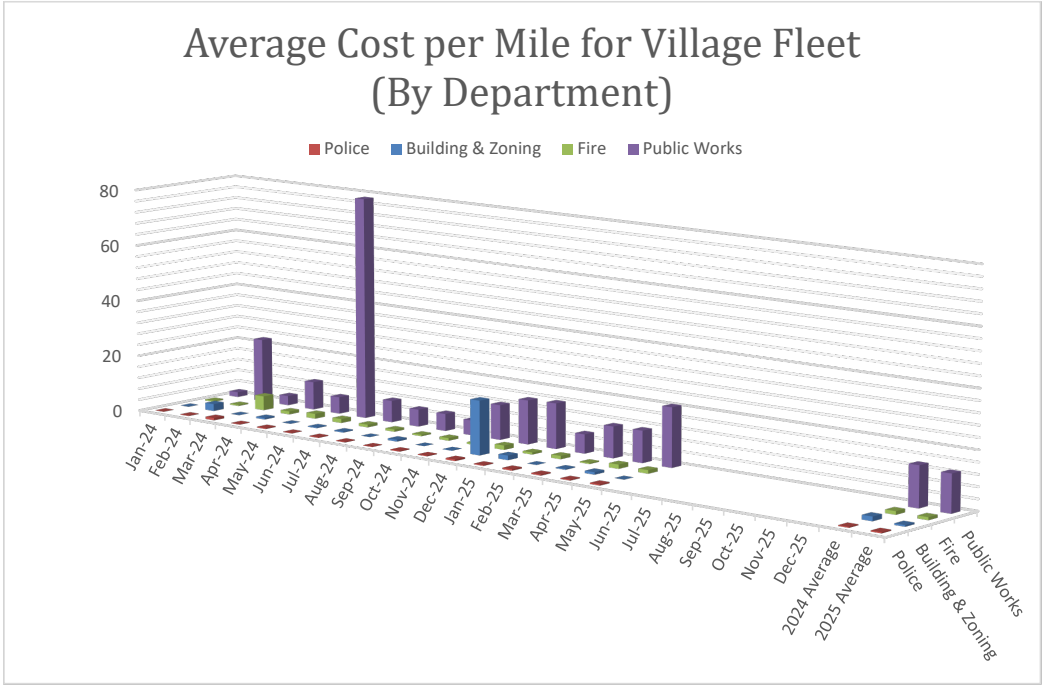


A core function of Public Works are related to the completion of work orders for several categories, including administrative, forestry, park maintenance, municipal property maintenance, right-of-way, snow and ice, street lighting, and storm water system maintenance. This chart shows the number of hours worked on major activities.

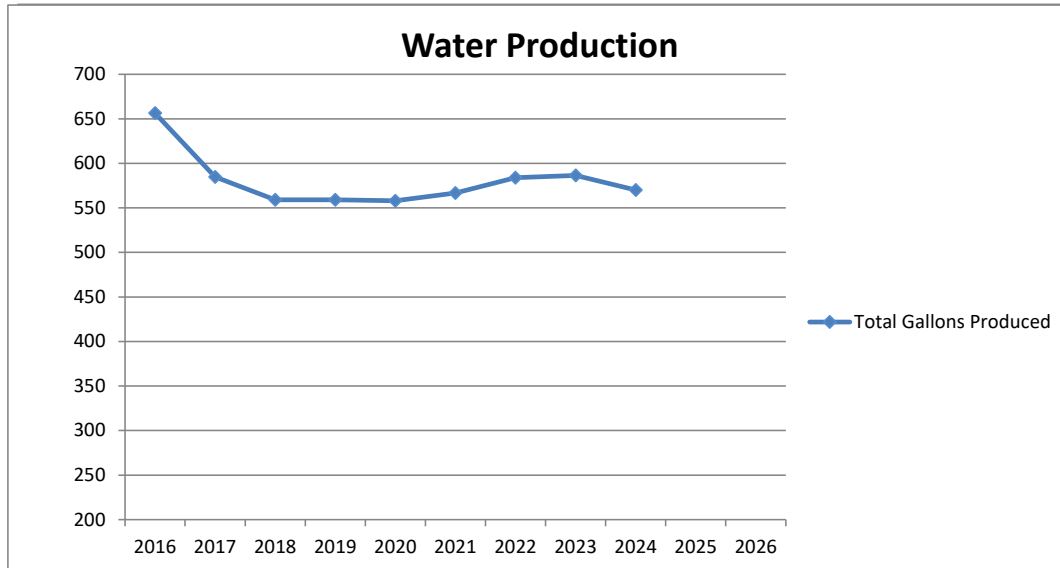


Tracking fuel consumption allows staff to make informed decisions relating to the municipal vehicle fleet, including the number of vehicles in each department, the types of vehicles purchased and the type of fuel source used. Dramatic fluctuations in fuel consumption can occur during events such as heavy snowstorms. (Output measure)





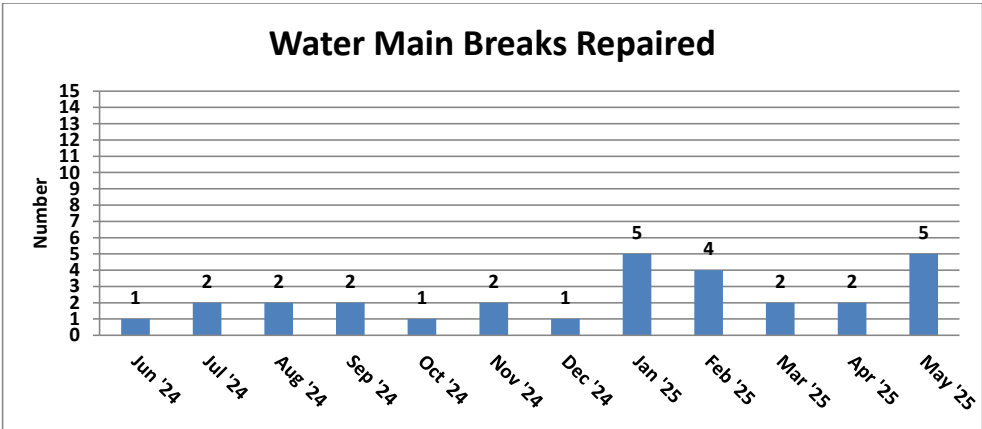
Vehicle cost per mile is an initial indicator of an efficient fleet operation. With basic cost per mile information in hand, all components that feed into that cost can be scrutinized and measured. These components include labor rates, fuel costs and parts costs. Looking further into the Village' vehicle cost per mile, staff can measure other components such as average vehicle age. When vehicles are replaced within their life cycle, the impact is usually positive.



From 2012 to 2015, there was a steady decline in the annual volume of water produced and used by our community. This trend was altered in 2016 due to dry weather leading to increased watering of lawns and landscaped areas.

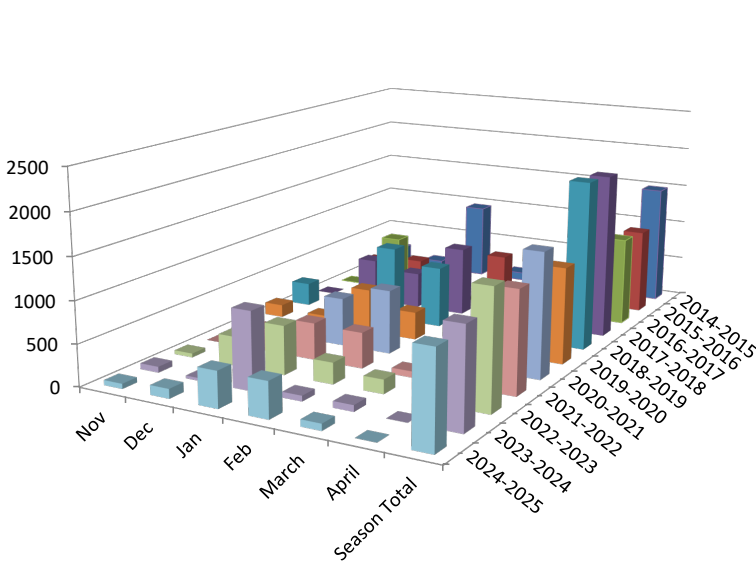
	2017	2018	2019	2020	2021	2022	2023	2024	2025
January	46.667	45.868	44.227	43.867	42.319	43.414	44.980	44.448	46.246
February	40.952	41.098	41.452	41.645	40.367	39.261	40.767	41.302	42.309
March	44.543	43.155	43.946	43.552	42.924	41.852	44.741	44.178	45.183
April	49.974	45.098	43.570	40.662	45.129	43.301	44.971	47.335	46.122
May	49.588	48.065	45.339	44.834	51.240	67.048	54.729	50.643	52.898
June	56.169	46.114	45.489	51.130	56.763	60.282	62.204	51.841	
July	53.755	57.074	59.526	54.529	53.105	55.144	56.076	50.569	
August	54.746	54.067	61.419	58.959	54.083	55.279	55.155	54.230	
September	53.928	46.809	44.786	51.040	51.058	48.164	50.266	51.738	
October	47.169	44.369	43.476	44.443	44.019	44.912	46.189	46.840	
November	42.335	42.089	41.475	40.680	42.441	40.581	42.471	41.675	
December	44.961	45.305	44.379	42.684	43.222	44.757	43.811	45.217	
<b>Total</b>	<b>584.787</b>	<b>559.111</b>	<b>559.084</b>	<b>558.025</b>	<b>566.670</b>	<b>583.995</b>	<b>586.360</b>	<b>570.016</b>	<b>232.758</b>
<b>Avg</b>	1.598	1.532	1.532	1.529	1.553	1.600	1.606	1.557	1.541
<b>% incr/decr</b>	-12.23%	-4.59%	0%	-0.02%	1.55%	3.06%	0.04%	-2.79%	

The highlighted months are the lowest for each of these months in the last 8 years. The highest monthly production in the last 8 years occurred in May of 2022. In 2024, our daily average was 1.56 million gallons per day.



A water main break can be a hole or crack in the water main. Common causes of breaks in the water main include: age, pipe material, shifting in the ground attributed to fluctuations in moisture and temperature (below and above the frost line), corrosive soil that causes a thinning of the water main pipe, improper backfill, severe changes in water pressure (hammer) which has several causes and physical contact (damage) by excavating contractors.

Tons of Road Salt



Gallons of Liquid Deicer

