



VILLAGE OF MOUNT HOREB

E. Main Street

Mount Horeb, WI 53572

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**SUSTAINABILITY & NATURAL RESOURCES COMMITTEE**

**Tuesday, August 26, 2025 at 7:00 PM**

Municipal Building Board Room

138 E. Main Street

Mount Horeb, WI

- 1) Call to order
- 2) Public Comments
- 3) Consent Agenda
  - a. Consideration of July 22, 2025 Meeting Minutes
  - b. Adopt a Municipality Reports
- 4) Agenda Items
  - a. Presentation by Slipstream: Findings of Building Energy Audits and Recommendations
  - b. Green Team Report
  - c. Bike City Designation
  - d. Recommendation on Coalition for More Responsible Transportation Membership
  - e. Resolution Requesting Consideration of Sustainability Features including Planting Native Plants at new Park at Lukken Farm
  - f. Discussion on 2026 Budget Request
  - g. Discussion on Sustainable Procurement
  - h. Update on Sustainability Plan
- 5) Future Agenda Items
- 6) Meeting adjournment.

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## **SUSTAINABILITY & NATURAL RESOURCES COMMITTEE**

**Tuesday, July 22, 2025 at 7:00 PM**

### **DRAFT MEETING MINUTES**

- 1) Call to order
  - a. Roll Call  
Chair White called the meeting to order at 7:00 p.m. Members present: White, Beheler, Grabe, Saltes and Roethle. Also present: Administrator Owen.
- 2) Public Comments  
No public comments.
- 3) Consent Agenda  
Grabe gave an update on the activities of the Green Team. Motion by Beheler to approve the consent agenda, second by Saltes. Motion carried.
  - a. Consideration of June 24, 2025 Meeting Minutes
  - b. Adopt A Municipality Reports
  - c. Green Team Update
- 4) Agenda Items
  - a. Yard in a Yard Program - Katie Hartman  
Katie Hartman presented the Yard in a Yard program where residents and businesses would designate a yard-sized section of their yard to be planted with native seeds. The program is a Green Team project and would be funded and carried out by Hartman. Hartman is looking to do a pilot program this year and has identified visible yards and some parks to use as examples for next year. She would take weekly pictures to help inform participants of what they could be seeing in their yard areas each week. Roethle asked what the SNR committee could do to help. Hartman indicated they could help with promotion and get the word out on the program. Grabe added that the Green Team has a promotional plan for the project. Peggy Zalucha, representing the Rotary club, reported that the Mount Horeb Rotary Club is supporting the program to fulfill one of the

Rotary's missions locally. Saltes asked about the option of using plugs rather than seeds. Hartman said she thought about it and, for simplicity and cost, seeds would be the best way to get started, but it may be an option to use one variety of plugs each year for people that are continuing in the program.

b. Bird City Designation

Behler reviewed the criteria for bird city designation, including the application and annual renewal fee of \$175. She added she is willing to work on the submittal but will not have time until October. The Green Team reviewed this item and, since it is a municipal designation, they felt it was best handled by the SNR and Village. Behler added that one key to the program are a Village-wide Welcome Back Bird day to coincide with the migration, so the goal will be to be submitted and prepared to participate on that day. Motion by Saltes to begin the process of seeking Bird City designation, second by Roethle. Motion carried.

c. Bike City Designation

Roethle reported on the bicycle-friendly designation. There is no cost to the application, and it creates a partnership between the Village and bicycling groups and businesses in the Village. The program essentially scores how bicycle-friendly the Village is, tells you what you do well and where you need to improve and, if you qualify, ranks you in one of three categories: platinum, silver or bronze. There is also an educational component to the program. Grabe stated she is in favor of seeking the designation but has concerns about the current status of the Village for safe biking and sees positives from the program and partnerships that can come out of it. For the next meeting, Roethle will reach out to the potential cycling groups and business partners. The grant application is due in June.

d. Pollinatory Pathway Discussion

Behler noted she is still willing to enter the Village properties but will not have time until fall. She added that Hartman's project will add many potential private pathway properties in the Village.

e. 2026 Budget Request

The Committee discussed the budget request of 2025 for \$1,000 which is being used for printing, and discussed other potential projects before year's end. The consensus was that they could use \$2,000 to expand programming, additional printing materials, postage, marketing and contributions to other projects. The committee will discuss further at next month's meeting.

f. Idling Reduction Project

1. Idling Reduction Utility Mailing Update

White reported he received a quote for the printing of the idling brochures at postal connections for \$400. The committee discussed the option of

using recyclable paper since we have budget money. White will follow up with the printer. Owen indicated White should follow up with Clerk Gaffney on the timing and instructions for getting the flyer in the September utility bill as an insert and any options for electronic distribution to those that receive electronic bills.

2. Discussion on idling reduction column

White will draft a column for the paper to coincide with the utility insert. The committee will review at the August meeting.

g. Discussion on Renewable Diesel

White presented the City of Madison is looking for partners interested in switching to renewable diesel for fueling municipal fleets. Owen reported that we do not have our own fuel tanks and use the Premier Coop, so we would need their buy-in and commitment. The committee was interested in the price and how it compares to regular diesel. White reported that except for in Californian it is much more expensive, but the hope is that getting bulk purchasing will bring the price down. Grabe stated she is interested in the metrics and how it would show reductions in carbon use. The consensus of the committee was that there is interest and the Slipstream report may help to give us more insight in the fuel use and benefits. Grabe is participating in an upcoming webinar and will share information with the committee and White will stay in communication with the City of Madison.

5) Future Agenda Items

Future agenda items include: Green Team Update, Bicycle Friendly Community Update, Idling Campaign Update, Sustainable Tourism Report, SNR Logo Discussion, Sustainability Plan Update.

6) Meeting adjournment.

Motion by Beheler to adjourn, second by Saltes. Motion carried. 8:32 p.m.



## Bicycle Friendly Communities

The League of American Bicyclists' Bicycle Friendly Community Program ranks communities across the United States as Platinum, Gold, Silver, Bronze and honorable mention.

The **Bicycle Friendly Community program** provides incentives, hands-on assistance and award recognition for communities that actively support bicycling through a combination of infrastructure, programs and policies. There are currently **22** Wisconsin Bicycle Friendly Communities in the **League of American Bicyclists Award Database** (select WI from the map and scroll for lists):

- **Platinum:** Madison
- **Silver:** Appleton, Fitchburg, La Crosse, Milwaukee, Shorewood, Stevens Point, Sun Prairie
- **Bronze:** Eau Claire, Green Bay, Janesville, Kenosha County, Menasha, Menomonie, Monona, Onalaska, River Falls, Sheboygan, Sheboygan County, Sturgeon Bay, Verona, West Allis



People on bicycles are an indicator species for vibrant, economically healthy communities where people want to live, work, do business and visit. Investments in bicycling yield tremendously high returns at a very small cost. Bicycling is such a cost-effective, simple solution for so many of today's complicated problems, it's no wonder communities across the state are working to make themselves more bicycle friendly.

### Get started in applying for a Bicycle Friendly Community Award!

- Begin by downloading and reading the **Bicycle Friendly Community Overview**.
- Take a few minutes to evaluate your community with this quick **Bicycle Friendly Community Scorecard**.
- Visit the League's **Application Portal**. The online application and process will require some research into demographics and infrastructure to complete.
- Plan your strategy for pitching bicycle-friendly improvements.
- Gather support.
- Call your government official and request a meeting.
- Ask for something specific and try to get a specific commitment. A good starting point is to ask if the person will submit the application for Bicycle Friendly Community status.
- Follow up and follow up (and follow up).
- Consider hiring the Bike Fed to create and submit your application – We have a proven track record of procuring designations including Madison's Platinum Status.

### The Five E's of the League of American Bicyclists Ranking Assessment:

- **ENGINEERING** – Bike lanes, bike routes, trails, bike parking, etc.
- **EDUCATION** – Availability of cycling education, safety materials, Safe Routes to School programs and number of League cycling instructors
- **ENCOURAGEMENT** – Bike to Work Week events, Bike Challenge participation, printed materials such as maps and brochures, fun events like Tour de Fat, etc.
- **EVALUATION and PLANNING** – Community Bike Plan, annual bike counts, evaluation of crash data, mode share, etc.
- **EQUITY** – while not an official "E", equity is an important consideration, and is the recognition that recognize that youth, women and people of color are underrepresented in many bike advocacy efforts and local transportation decisions.

### Funding and Technical Assistance Grant Opportunities courtesy of League of American Bicyclists as of February 2025:

- AARP Community Challenge Grant
  - <https://www.aarp.org/livable-communities/community-challenge/>
  - Their microgrant category includes a Bike Audit microgrant that includes funding and technical assistance from the League of American Bicyclists!
- USDOT Grant links:
  - Key Notices of Funding Opportunities: <https://www.transportation.gov/bipartisan-infrastructure-law/key-notices-funding-opportunity>
  - Discretionary Grants dashboard: <https://www.transportation.gov/grants/dashboard>
- U.S. Conference of Mayors Grant Application Bootcamp:
  - <https://localinfrastructure.org/application-bootcamp/>
- Federal Funding Resources from the League:
  - <https://bikeleague.org/federal-funding-resources/>
  - <https://data.bikeleague.org/in-this-report/federal-transportation-funding/>

### Keep Wisconsin Biking Strong!

Wisconsin Bike Fed's advocacy work to help residents and communities is made possible thanks to our supporters. Please consider making a gift or joining as an organizational member today!

[DONATE](#)

### RELATED CONTENT

MAY 14, 2025

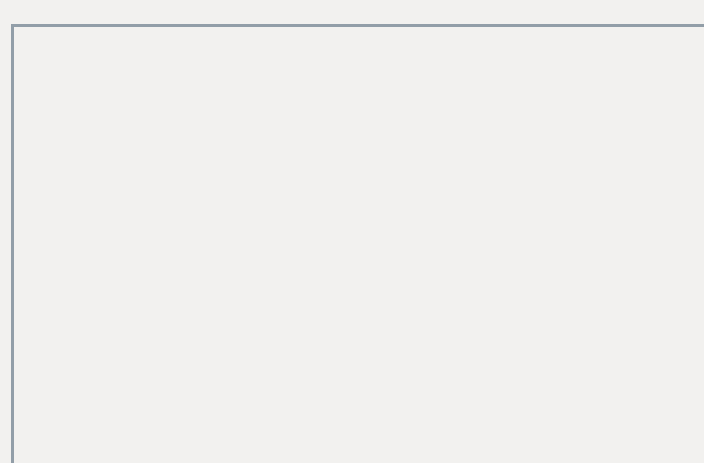


ADVOCACY

#### Wisconsin River Recreational Bridge

May 8 2025 Celebration of Progress

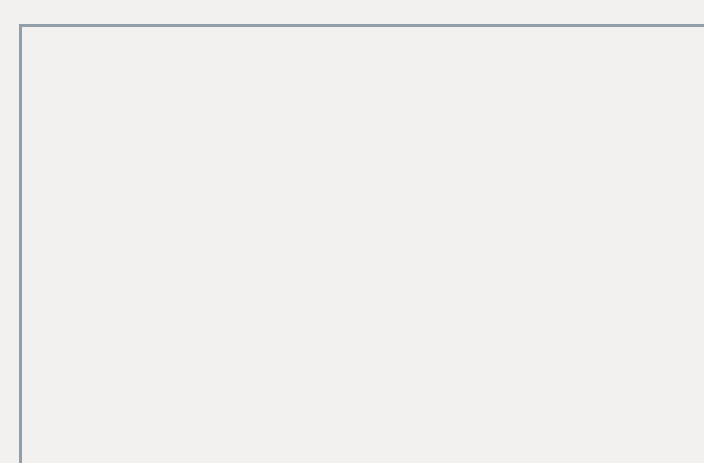
MAY 1, 2025



#### Things are Moving so Fast

... And Not All of it is Great

APRIL 24, 2025



#### What Do you Do with Unimaginable Grief?

In partnership with Madison Bikes and Machinery Row, Alicia Bosscher and Dirk...

## We're building a better, more bike-friendly Wisconsin.

The Bike Fed is here to cultivate, motivate and unite a strong community of residents as well as business and political leaders to move bicycling forward in Wisconsin – through education, legislation and involvement.

[SUPPORT US!](#)



### Our Locations

187 E Becher Street - Suite B  
Milwaukee, WI 53207-1245

612 W Main St - Suite 200  
Madison, WI 53703-4714

Office Hours Vary. Visits by Appointment.

[CONTACT US](#)

### Stay Connected! Be Counted!

Subscribe to receive the latest info on Wisconsin bicycling with our weekly E-Newsletter (Saturday mornings) and occasional Action Alerts AND be counted as one of our supporters!

"\*" indicates required fields

First Name Last Name

Email Zip Code

City County

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### Learn More About Us

- [About the Wisconsin Bike Fed](#)
- [Board of Directors](#)
- [Staff](#)
- [Careers](#)
- [Media Kit PDF](#)





## AGENDA ITEM REPORT

### MEETING DATE

August 26, 2025

### PREPARED BY

Nicholas Owen, Administrator

### AGENDA ITEM # 4.d

Recommendation on Coalition for More Responsible Transportation Membership

### BACKGROUND

Here is information on the Coalition for More Responsible Transportation (CMRT) with an invitation to join!

This Wisconsin statewide coalition of transportation advocates focuses on connections within and between communities, a range of transportation options, inclusive transportation planning and decision-making, redesigned communities and investments that will benefit all Wisconsinites. In short, CMRT advocates for improvements to Wisconsin Department of Transportation processes and policies and improvements to transit, walking and biking options. ([Full vision statement here](#))

[CMRT is inviting you and your organization\(s\) to join by filling out this form.](#)

### RECOMMENDATION

### ATTACHMENTS

None



## AGENDA ITEM REPORT

### MEETING DATE

August 26, 2025

### PREPARED BY

Nicholas Owen, Administrator

### AGENDA ITEM # 4.e

Resolution Requesting Consideration of Sustainability Features including Planting Native Plants at new Park at Lukken Farm

### BACKGROUND

The Parks, Recreation and Forestry Commission will be making a recommendation on which concept plan the Village Board should approve and move forward with fundraising efforts and development. A committee member requested this item be added to provide input to the Village Board on incorporating sustainable items into the parks design. Administrator Owen will work on a draft resolution with some talking points for the meeting.

### RECOMMENDATION

### ATTACHMENTS

1. Presented Concept A
2. Presented Concept B
3. Bioswale







**Theresa Nelson**

8:17 AM

To: Jack & 2 more... >



Hi Jack – I’m glad you got to experience our monarch haven! This type of stormwater facility is called a bioretention basin. It’s distinguishing characteristic is that it has a layer of “engineered soil” (sand & compost) that the plants are planted in – this helps to trap sediment while still maintaining infiltration. Bioretention basins are also required to be planted in native vegetation. The big winner for the monarchs in this basin is the meadow blazing star – one of their absolute favorites!

All the parking lot drains to this basin. The beds at the southern end are just planted in natives that like shade. We’re still working on getting those filled in – the animals like to eat the plants :\

Hope you’re having a great summer!



**Theresa M. Nelson, P.E.**

**Water Resource Engineer, Water Resource Engineering Division**

5201 Fen Oak Drive #208, Madison, WI 53718

Cell: (608) 577-4879 | [website](#) |

pronouns: she/her/hers







## AGENDA ITEM REPORT

### MEETING DATE

August 26, 2025

### PREPARED BY

Nicholas Owen, Administrator

### AGENDA ITEM # 4.f

Discussion on 2026 Budget Request

### BACKGROUND

Continued discussion on the 2026 budget request by the SNR committee. One potential item would be membership in the [Sustainable Business Council](#). I'm including the membership brochure as an attachment to the packet as well.

### RECOMMENDATION

### ATTACHMENTS

1. WSBC Membership Book 2025

**Educate.  
Measure.  
Improve.  
Connect.  
Membership.**



**SUSTAINABLE BUSINESS  
COUNCIL MEMBER**

Educate. Measure. Improve. Connect.

**Our mission is to advance the integration of sustainable principles and practices in business.**

**Join Today!**

Membership is your gateway to connecting with expert knowledge, impactful programs, and valuable services. By joining, you gain access to resources that support the integration of your sustainability goals and amplify your impact.





A WSBC membership helps businesses, organizations, and individuals:

**Educate. Measure. Improve. Connect.**



### **Business Membership Strengthen Your Sustainability Strategy**

Your Business Membership connects you to a community of local businesses and sustainability leaders who are driving impactful solutions. As a member, you gain access to benchmarking tools, resources, and strategies to measure and enhance sustainability performance within your organization. Additionally, membership elevates your company's profile as a contributor to a resilient, sustainable future.

### **Affiliate Membership Join a Community of Sustainability Advocates**

Affiliate Membership empowers nonprofits, governmental, and higher education entities to collaborate with Wisconsin's sustainable businesses. Affiliates can co-host events, cross-promote initiatives, and partner on sustainability programs. Membership also offers networking, skills development, and opportunities to promote aligned work, contributing to a stronger, sustainable future..

### **Individual Membership Elevate Your Sustainability Career**

Individual Membership helps boost your marketability as a sustainability professional by providing access to networking, collaboration with industry leaders, and education tailored to developing your skills and credentials. Stay ahead of sustainability trends and discover new employment opportunities within Wisconsin's leading sustainability-focused businesses.



**Join and become part of the movement towards a resilient and sustainable future.**

Please contact Jessy Servi Ortiz at [jessy@wisconsinsustainability.com](mailto:jessy@wisconsinsustainability.com) to sign up today.

Visit our website for additional information: [WisconsinSustainability.com](http://WisconsinSustainability.com)

Jessy Servi Ortiz  
Executive Director of the WSBC



## Benefits of being a member:



### CONNECT

Connect, network, and collaborate with other sustainability-focused members, including participants in the Green Masters Program®.

Gain direct access to industry sustainability experts for questions and shared learning.

Access a searchable online member directory complete with business profiles.

Enjoy exclusive discounted rates on special events and the annual conference.

Engage with committees or working groups to exchange ideas, leverage best practices, and advance sustainability.

Take on leadership roles within committees or working groups to gain growth and leadership experience.

### EDUCATE

Enjoy free access to member webinars, educational seminars, and roundtables.

Participate in peer learning through meetings and events that foster idea exchange and innovation.

Access the exclusive WSBC member portal with a directory, job board, and a sustainability resource library, including webinar recordings, virtual conference sessions, and courses tailored to advancing sustainability in businesses.

Take on leadership roles within committees or working groups to gain growth and leadership experience.

### MEASURE & IMPROVE

Participate in the Green Masters Program at no additional cost, helping you identify and prioritize key sustainability areas material to your organization.

Meet customer demand by focusing on sustainability practices that add business value and resonate with stakeholders.

Identify inefficiencies, reduce waste, cut costs, and enhance both financial and environmental performance.

Gain recognition for your sustainability achievements by using the Green Masters Program® logo in your branding, showcasing your commitment to continuous improvement.

Access industry-specific insights and recommendations through strategic guidance to help navigate the evolving landscape of sustainable business practices.



### SHOWCASE

Feature your business logo and sustainability commitment on the WSBC website under current members.

Use WSBC member logos, badges, and window decals to highlight your support for sustainability advancement.

Promote company news, events, or job listings through our channels and gain special marketing opportunities.

Share your sustainability success by speaking at events or co-creating case studies.

Display the exclusive Member-only logo and showcase your support for the Business as a Force for Good movement.



# Membership Investment

Company membership level based on company employee count.

COMPANY SIZE	VALUE
1-25 Employees (1 Member user ID)	\$500
26-150 Employees (2 Member user IDs)	\$750
151 - 500 Employees (3 Member user IDs)	\$1,250
501 - 5,000 Employees (4 Member user IDs)	\$1,750
5,000 + Employees (5 Member user IDs)	\$2,500

\*Fee for additional member IDs to be determined based on cost.

INDIVIDUAL MEMBERSHIP INVESTMENTS	VALUE
Professional	\$250
Student / Retiree	\$55



# Member Sponsor Opportunities

## PROGRAM SPONSOR

Sponsor the advancement of WSBC programs like the Green Masters Program and 21st Century Pathways. Your sponsorship helps improve these programs. If needed a version specific to the needs of your company may be built.

## EVENT SPONSORSHIP

Sponsor specific regional events focused on a sustainability topic. Perhaps a Peer to Peer meeting or an educational event? This can include hosting, promotion, food or beverage donation, etc..

## CONFERENCE SPONSORSHIP

Showcase your commitment to sustainability by supporting our annual B2B conference.

## AWARDS SPONSOR

Sponsor innovation and the advancement of best practices in the field of sustainability by partnering to support the annual WSBC awards program. This can include hosting, promotion, food or beverage donation, etc..

Please contact Jessy Servi Ortiz at [jessy@wisconsinsustainability.com](mailto:jessy@wisconsinsustainability.com) to sign up today.

Visit our website for additional information: [WisconsinSustainability.com](http://WisconsinSustainability.com)



# **Sustainable Purchasing** Policy & Plan Development





# Agenda

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- Policy & Plan Development
- Timelines & Training
- Lessons & Strategies





# Developing a Policy & Plan

- 2-Stage Process
  - Stage 1: Write & Adopt a Policy
  - Stage 2: Research, Write & Adopt an Implementation Plan
- Why?
  - Adopted Policy = Directive
  - Adopted Policy ≠ Implementation
  - Saves Time

## CITY OF MIDDLETON SUSTAINABLE PURCHASING POLICY

### 1. Purpose

The City of Middleton recognizes its responsibility to minimize negative impacts on human health and the environment while supporting a diverse, equitable, and vibrant community and economy. The City also understands that the types of products and services it buys have inherent social, human health, environmental, and economic impacts. For these reasons, the Common Council desires that procurement decisions align with the City's vision for sustainability: "We meet the needs of the present without compromising the ability of future generations to meet their own needs."<sup>1</sup>

This Sustainable Purchasing Policy is intended to:

- Communicate the City's commitment to sustainable purchasing to its employees, vendors, and the community;
- Complement and advance implementation of the City's sustainability goals;
- Guide Policy implementation; and
- Empower employees to innovate and demonstrate leadership by making procurement decisions that help Middleton achieve the sustainability benefits articulated in this Policy.

### 2. Policy

#### 2.1 General Policy

City employees will procure products and services in a manner that protects human health and the environment, is fiscally responsible, and promotes social equity, historically disadvantaged business opportunities, and other economic benefits to the community. This Policy applies to all City departments and employees, vendors, contractors, and grantees for all products and services provided to the City.

While it is desirable to have all purchasing decisions live up to Middleton's sustainability vision, the highest priority is adhering to this Policy when procuring products with a high impact and/or high cost, whether cumulatively or per unit.

#### 2.2 Sustainability Benefits

City employees will consider the following sustainability benefits when making procurement decisions, writing specifications, and evaluating bids.

##### A. Environmental and health benefits

- Achieving the City's goal of obtaining 100% of its electric needs for City operations from renewable sources by 2035;
- Lowering greenhouse gas emissions associated with a product's manufacture, transportation, and use consistent with the renewable energy policy (i.e., 100% renewable energy for all City operations by 2040);

<sup>1</sup>City of Middleton Comprehensive Plan 2021, p. 4. This Policy also advances the core principle of "Sustainability & Resiliency" stated in the City's 2022 Strategic Plan: "The City of Middleton uses proactive strategies and practices to meet emerging future needs across all sectors of the community and endure future disruptions to our climate, ecological, and social systems."



## Sustainable Purchasing

SPP IP 2025

An Implementation Plan

City of Middleton, WI



# Purchasing Policy

- Keep it Simple
  - Short ~ 3 pages
- Include
  - Purpose
  - Benefits
  - Scope
  - Implementation Guidance
    - Plan Directive
    - Measurement
    - Responsibilities
    - Maintenance

## CITY OF MIDDLETON SUSTAINABLE PURCHASING POLICY

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# Implementation Plan Development

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1

Start with a  
Polished  
"Draft"

2

Use an  
Iterative  
Process

3

Include a  
Timeline &  
Training



# Development Stages

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1

Face-to-Face  
Staff Meetings

Potential for Differing Mindsets



# Differing Mindsets



Your Thoughts



Your Dream



Staff's Nightmare



# Meetings

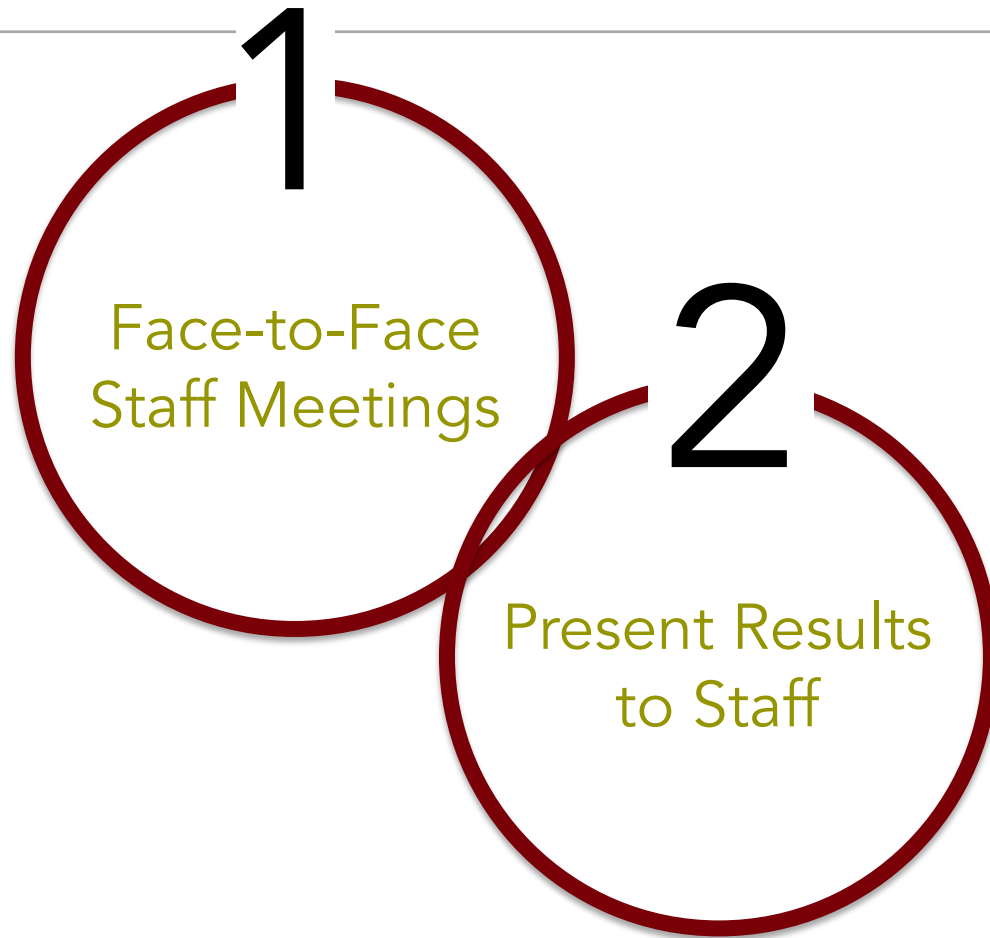
- 13 Departmental Leaders (Groups)
  - Concerns
  - Suggestions
- 2 Financial Leadership (Individual)
  - Procurement Process
  - Budget Process





# Development Stages

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Show You Heard Them



# Staff Concerns

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## ■ Lack of Support

- Overwhelmed – Don't know where to start
- Skeptical – Be here before with no follow-through
- Misinformation – who gets blamed for mistakes
- Governmental Constraints – state statutes

## ■ Measurement

- Difficulty standardizing across departments
- Who determines which purchases justify tracking?

## ■ Unique Circumstances

- Specialty vehicles/equipment
- Necessarily one-time use products
- Donations

## ■ Budget & Purchasing Process

- Logistics of interdepartmental & bulk purchasing
- Cost affects on departmental budgets

## ■ Contractual & Planning Issues

- Long-term existing contracts
- Need for infrastructure
- Lack of certainty in planning
  - Community Campus

## ■ Guidance

- More guidance & specificity
  - Evaluation criteria
  - Definition of a “major purchase”



# Staff Suggestions

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## ■ Prioritization

- Set priorities; identify cutoffs
- Prioritize each department's focus
- Infrastructure key to transition

## ■ Planning

- Have a holistic strategy/plan – not piecemeal
- Realistic with timelines
- Carrot v. stick motivation
- Acknowledge limitations

## ■ Finance

- Make budget requests through Common Council
- Review budget line items/See what actually purchase

## ■ Measurement

- Capture what's already being done
- Define criteria more clearly

## ■ Guidance

- Standards helpful
- Add vendor instructions
- Create a preferred vendor list
- Create a green purchasing guide
- Provide vendor language
- Provide more specifics
- Provide more direction on certifications/EPDs for comparing products
- Need a central resource to go to



# Implementation Plan .V2

- Overview
- Prioritization
  - Flowchart
- Guidance
  - Category
  - Certifications
  - Tools
- Measurement
  - Category Suggestions
- Timeline
  - 5-Yr Plan



## Sustainable Purchasing

SPP IP  
DRAFT V2

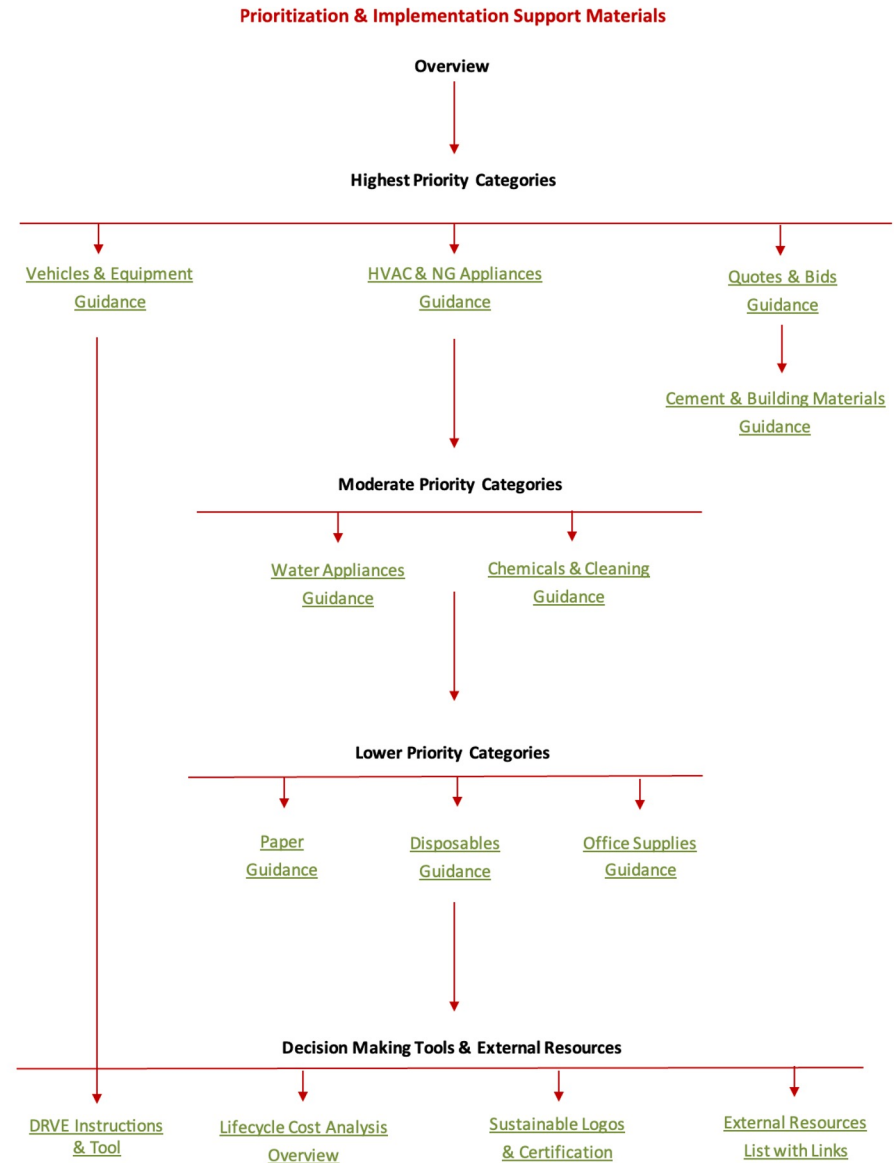
An Implementation Plan

City of Middleton, WI



# Prioritization

- Highest
  - Climate/Energy
- Moderate
  - Chemicals & Water
- Lowest
  - Paper & Smaller Impact Items





# Guidance Sheets

## Guidance for Purchasing Powered Equipment and Fleet Vehicles

Thank you for integrating sustainability measures into your purchasing habits. Your efforts help Middleton achieve more environmentally responsible, healthy, and just purchasing objectives.

Fleet assets are major purchases with high energy impact that require careful consideration. To assist, the Fleet Asset Life Cycle Analysis (FALCA) tool was developed to enable users to compare existing assets and potential replacement assets. See the FALCA tool document for more details.

### Maxim | Choose Future Vision over Traditional Solutions |

In 2019, the City's annual fleet-based emissions was estimated at ~500 metric tons of CO<sub>2</sub>. Achieving Middleton's Sustainable City Plan (SCP) greenhouse gas (GHG) emission goals cannot be accomplished with like-for-like asset replacement at the end of service life. Therefore, it is imperative that less polluting replacement options be considered and chosen whenever fiscally possible.

### Standard

1. Purchase requests must include a life-cycle cost analysis (LCA), which compares cost and emissions impacts for new assets vs existing assets. The analysis is to be done using the FALCA tool or a similar tool.
2. Preference will be given to electrically driven assets to take advantage of the rapidly shrinking carbon footprint associated with grid-based electricity, and the documented cost savings associated with electric drive system maintenance. Purchase requests that do not include electric drive system options must be accompanied by a justification statement regarding why.
3. Given the City's goal of 100% renewable energy by 2040, no equipment or vehicle powered by fossil fuels with a lifespan beyond 2040 should be purchased. If no electric, biofuel, or renewable-energy-fueled option exists, then a leasing agreement ending prior to 2040 should be pursued.

### Questions

Please consider the following questions when making your purchasing decisions.<sup>3</sup>

1. Did I conduct a LCA analysis?
2. Did I select a non-carbon-based asset?
  - a. If not, what is my justification for this decision?

### Tools & Instructions

Please reference the guidance listed below while materials custom to Middleton are built.

Custom Middleton Tools

[Lifecycle Costing Overview](#)

FALCA/LCA/TCO Tool Instructions

FALCA/LCA/TCO Tool Calculator

External Resources

[UNC Understanding Lifecycle Cost Video](#)

3:22 – *Highly Recommended*

[AK Lifecycle Cost Analysis Guide](#)



# Measurements

## **Annual Measurement Suggestions** (Priority Level listed in red)

The following are suggestions for measurement with data collection options listed in red. In the interim, an Implementation Index developed by the *Sustainable Purchasing Research Initiative* will be used while a measurement system custom to Middleton is built.

### **Quotes, Proposals, & Bids Measurement (1)**

Annually report the sustainability disclosures requested and documentation received for each RFP (e.g., requested disclosures 10 projects, received 5). List how the vendor's response was weighted (e.g., 2% of the decision rule) of the overall proposal evaluation. Submit received disclosures with the report.

Could be done automatically through eProcurement system

### **Cement & Building Measurement (1)**

Annually report the embodied carbon staff lead (e.g., Engineer Smith), the number of EPDs requested and collected (e.g., requested EPDs for 10 projects, received 5), and the amount of low-carbon building materials used (e.g., 1000 lbs Type II). Submit all EPDs received with the annual report.

Could be done tracked automatically through eProcurement system

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Annually report the number of gas- and electrically-powered (e.g., 7 gas furnaces & 0 electric heat pumps at Senior Center) equipment in service. Note energy-efficient certification and energy-efficient rating (1 Energy Star certified electric water heater at City Hall) if given. List plans for conversion over the next 5 years (e.g., researching electric HVAC & cooking options for the new Community Campus building).

Conduct City-wide HVAC & Appliance Inventory & Create a Reduction Plan

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Could be done if data is received in an analyzable format (i.e., not a PDF)

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Annually report the amount of natural gas used in all airport buildings, including leased hangers. Annually report aircraft fuel sales by type and amount.

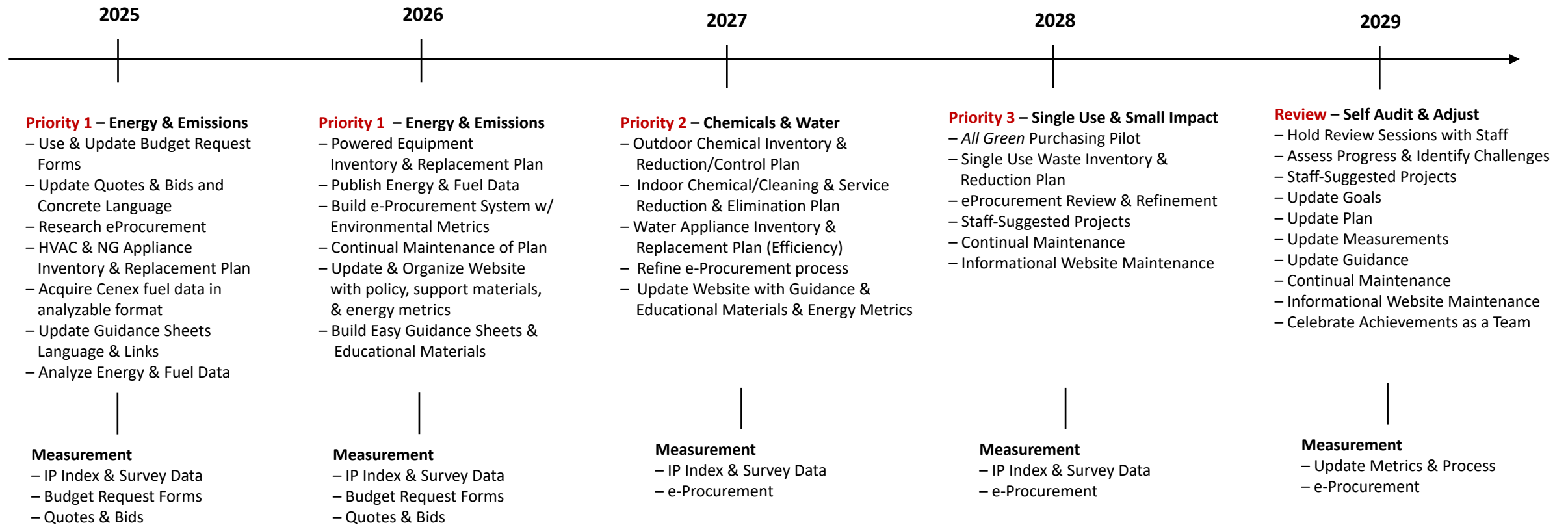
Create 20 Yr Reduction Plan

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Annually report a list of products containing toxins, their purpose (e.g., herbicide, general cleaning), and any reduction in use from the previous year (e.g., used 10% less, requested green practices from current vendor through contract period).



# 5-Yr Implementation Plan Timeline





# Checklist

- Maxim
  - Follow Dane County Guidance
- Processes
  - Research
  - Decision Making
  - Budget Requests

## Sustainable Purchasing Checklist for High Value/High Impact Items

### Maxim | Sustainability is the Default – Justify All Else |

Use the following checklist to evaluate major, high-investment/high-impact purchases, such as vehicles and HVAC systems. When cost, product availability, or other considerations make the most sustainable option untenable, use the checklist to identify possible solutions or to justify the purchase request.

#### Research Process

- Research Product Options
- Conduct Lifecycle Cost Analysis using FALCA or other LCA tool
- Contact Sustainability Coordinator for:
  - Assistance with LCA Tool
  - Relevant Grants & Rebates
  - Relevant City Goals/Objectives
- Compare the Lifecycle Cost of Options
  - With & Without Rebates
    - Rebates May Be Saved in Transition Fund for Future High Value/High Impact Purchases\*

#### Decision Justification Process

- Choose Most Sustainable Option if:
  - The Cost exceeds the Cheapest Option by no more than XX%\*\*
- If choosing a Less Sustainable option, then:
  - Justify the Decision. Choose all that apply.
    - Sustainable Option cost Exceeded XX% Threshold
    - Lack of Product Availability
      - Can this purchase be delayed?
        - Yes or No
    - Lack of Necessary Infrastructure
      - Contact Sustainability Coordinator with the Specific Needs
        - Can they be addressed in a timely fashion?
          - Yes or No
      - Contact Common Council with the Specific Needs
        - Can they be addressed in a timely fashion?
          - Yes or No
    - Meets Required Departmental Needs
    - Meets Other City Goals/Objectives
      - List Specific Goal(s)

#### Budget Request Process

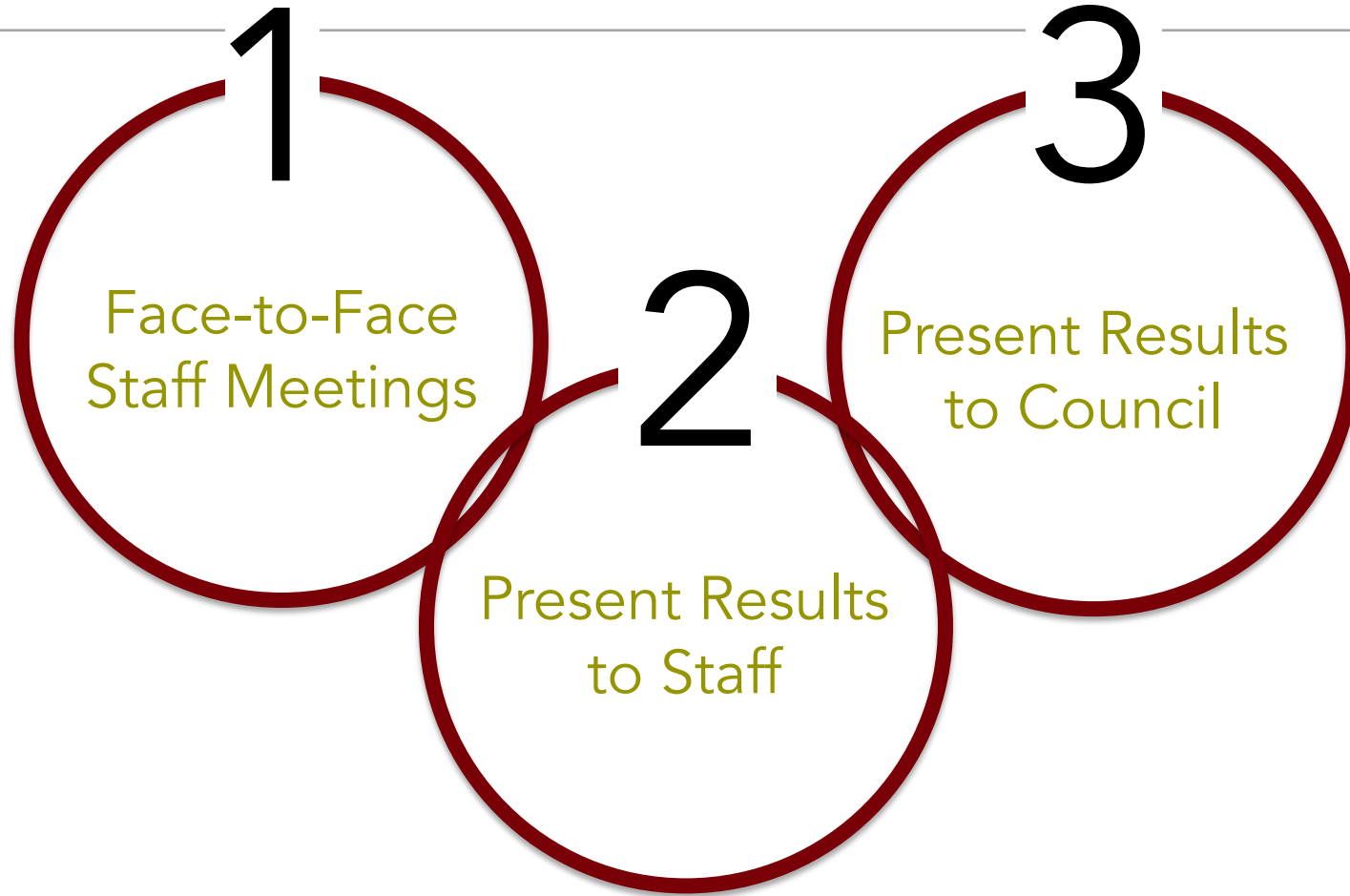
- Describe the Request in the Budget Request Form
- List Specific City Goals/Objectives the Request Addresses
- Include Decision Justification in Budget Request Form

\*Common Council would need to approve a Transition Fund. Sun Prairie puts all EV rebates and fuel savings into a fund used to purchase additional fleet vehicles.

\*\*Actual threshold to be determined by the Common Council. Milwaukee Co. uses a 20% threshold when the most sustainable choice is more expensive than the cheapest option.



## Development Stages



Progress & Proceed



# Implementation Plan .V3

- Overview
- Prioritization
  - Flowchart
- Guidance
  - Category
  - Certifications
  - Tools
  - Training
- Measurement
  - Index
  - Category Suggestions
- Timeline
  - 5-Yr Plan
- Checklist
  - Staff-Requested



## Sustainable Purchasing

SPP IP  
DRAFT V3

An Implementation Plan

City of Middleton, WI



# Council Assistance

- Transition Fund
  - Rebates and Fuel Savings
  - Future Purchases
- Cost Threshold
  - Percent Allowance

## Sustainable Purchasing Checklist for High Value/High Impact Items

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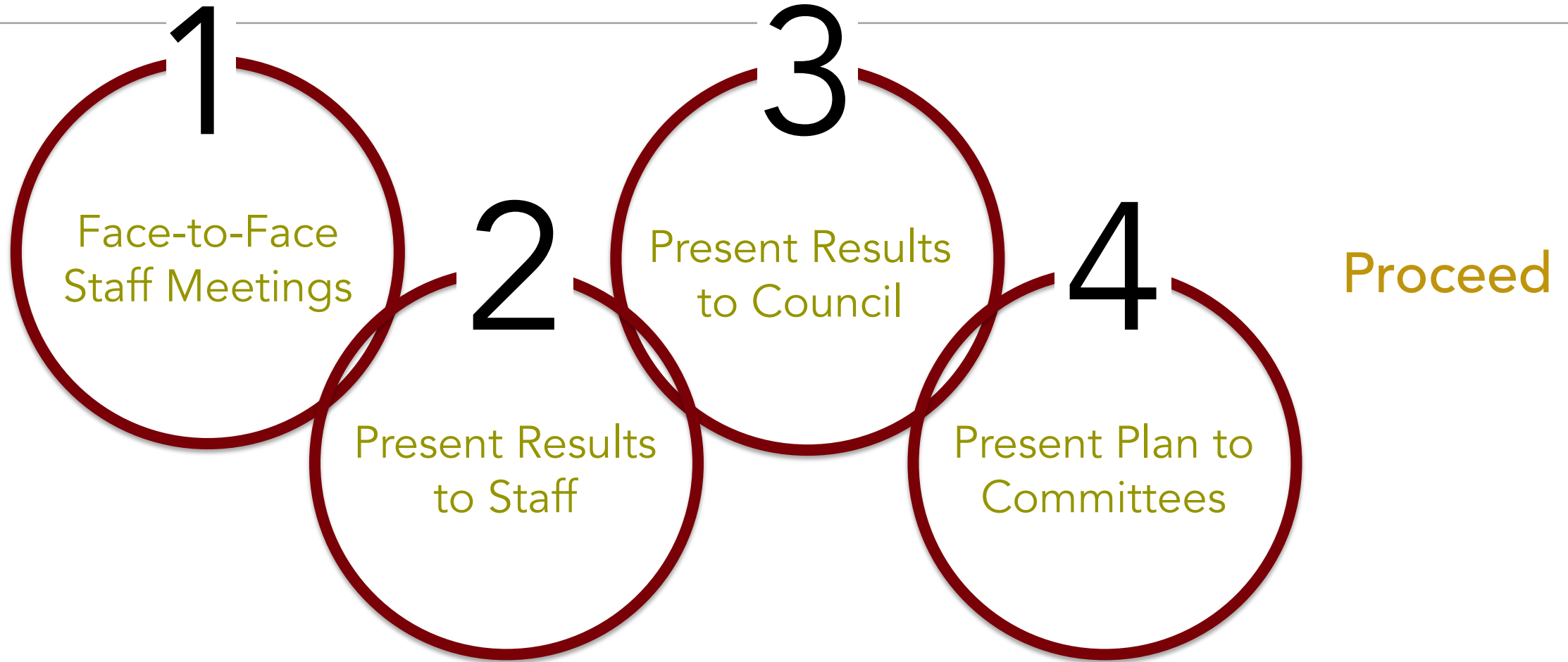
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# Development Stages





# Committee Meetings

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## ■ Presentations

- Community Campus – 11/20
- Public Works – 11/26
- Parks & Rec – 12/2
- Golf – 12/16
- Sustainability – 1/27
- Aging – 2/17

## ■ Declined Presentation

- Tourism
  - Staff previously participated
  - Staff shared plan with committee
- Library
  - Staff previously participated
  - Staff shared plan with committee



# Committee Concerns

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## ■ Concerns

- FALCA tool
  - Complexity, maintenance over time
- Standards
  - Compliance, 100% attainable?
- Building Codes
- Quotes & Bids Language
  - Legality, feasibility, limiting bidders
- Lack of Product Availability
  - Low-carbon asphalt & cement
- Lack of Training on Replacement Tech
  - Not well-versed in new technology
    - *Not sure what agreeing to*
- Threshold Level
- Chain of Command
  - Who enforces compliance?



# Committee Suggestions

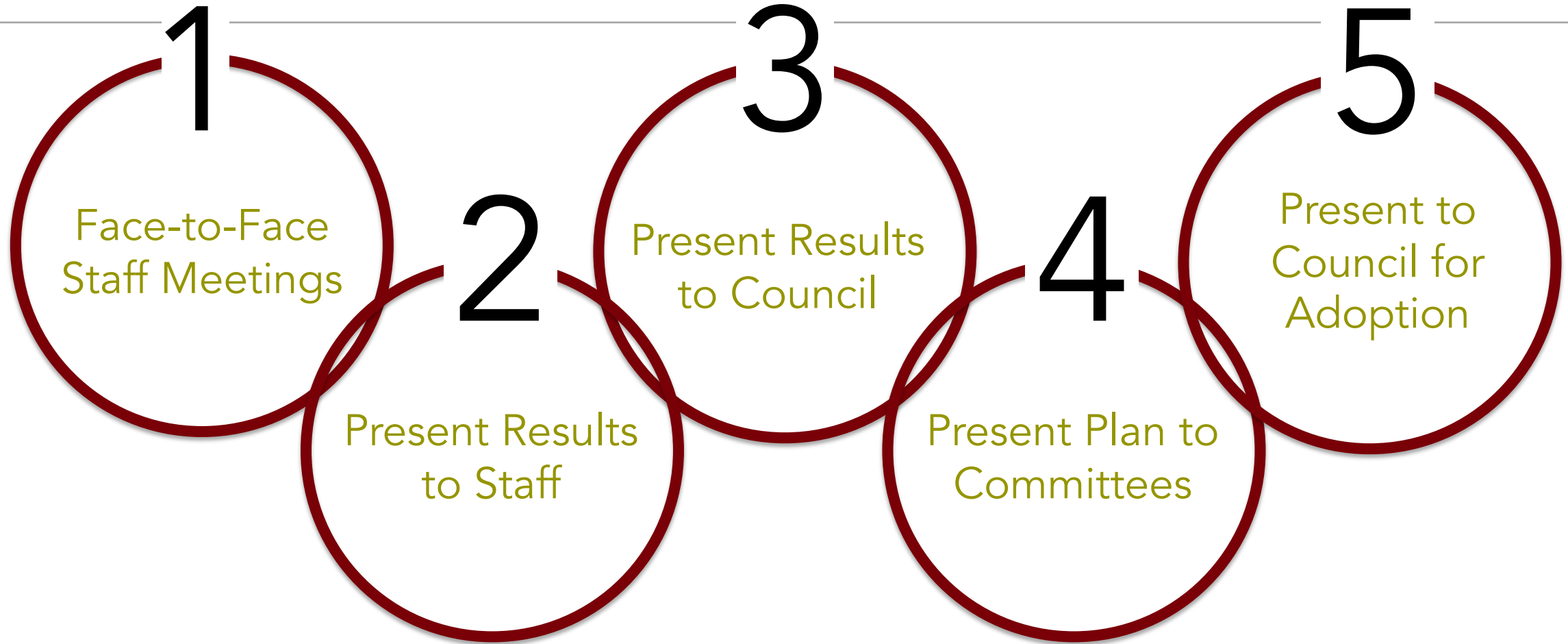
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## ■ Suggestions

- FALCA tool
  - Vet, consider alternatives
- Standards
  - Review annually
- Building Codes
  - County-wide education
  - Work with future in mind
- Quotes & Bids Language
  - Include state law & minimum requirements
    - Don't *require* sustainability plans of bidders
- Lack of Product Availability
  - Need larger entities to push Industry
- Thresholds & Chain of Command
  - Council determines



## Development Stages





## Premium

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- A 20% premium is allowed for all sustainable purchases. Sustainable options exceeding the cost of a similar traditional product or service by more than 20% must be approved by the department head, city administrator, or Common Council.

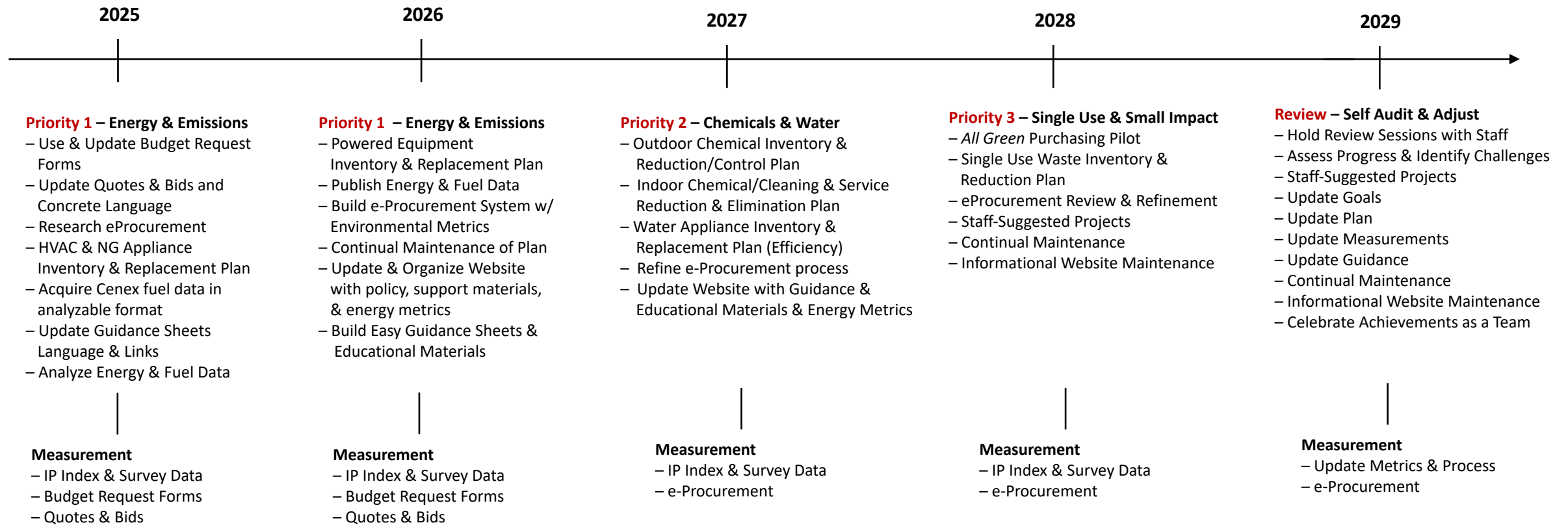


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# Questions



# 5-Yr Implementation Plan Timeline





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# Measurement

“Capture What’s Already Being Done”

- Anonymous Questionnaire
  - Implementation Effectiveness Index\*
  - 3 Open-ended Questions
    - # 1 Assistance Request
    - # 1 Sustainability Project
    - Additional Comments



\*Source: Hsueh et al. (2020) <https://doi.org/10.1108/IJPSM-09-2019-0233>



# Index Measurement

- SPP Implementation Index\*

- 16 Item Scale
  - Standards & Rules
  - Routines
  - Decision-Making Criteria

- Middleton

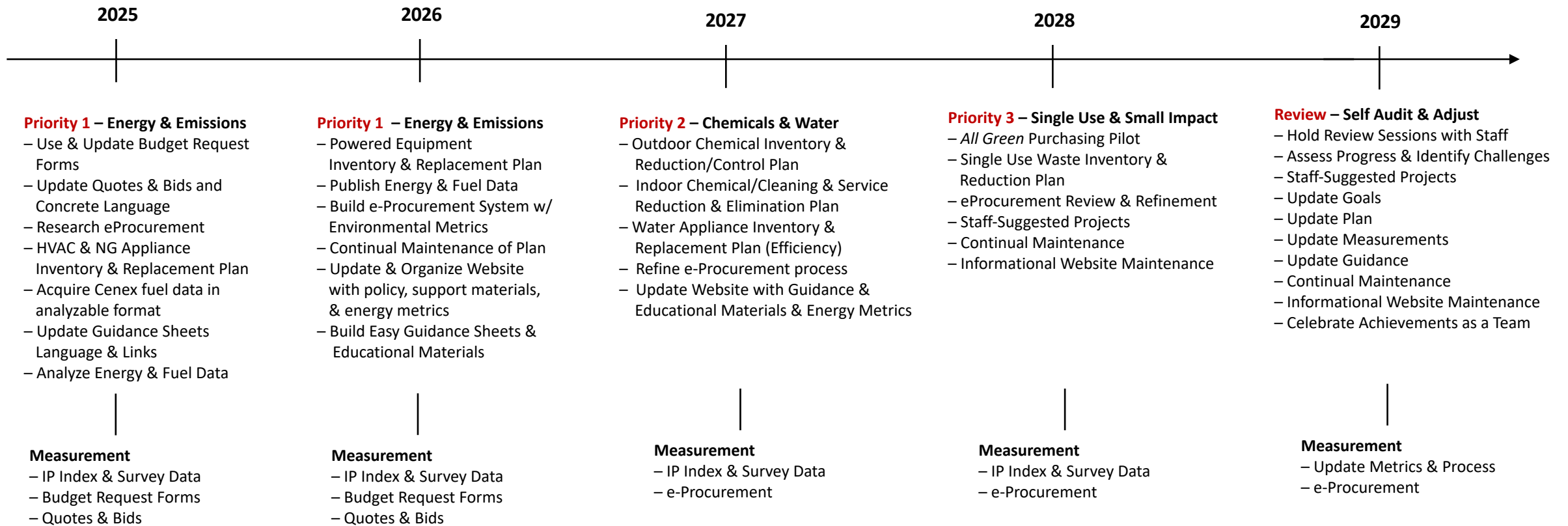
- Above Average
  - 14 criteria
- Below Average
  - Chemicals & Cleaning
  - Road Construction

\*Source: Hsueh et al. (2020) <https://doi.org/10.1108/IJPSM-09-2019-0233>

Variable	Mean	Comparison
<i>Standards and Rules: Rate the importance of plan &amp; goals.</i>		2.72
• Implementation Plan (e.g., purchase 30% minimum post-consumer paper)	3.20	NA
• Sustainable Purchasing Policy Goals, (e.g., achieve carbon neutrality by 2030)	3.00	NA
<i>Routines Purchases: Rate the importance of environmental Concerns in your routine purchases.</i>		
• Chemical & Cleaning Products	3.33	3.42
• Road Construction	2.80	3.13
• General Construction Services	3.29	3.03
• Electrical Products	3.14	3.05
• IT Hardware & Services	3.17	2.91
• Professional Services	3.22	2.70
• Transportation/Fuel	3.38	3.11
• Wood and Paper Products	3.11	3.00
<i>Decision-Making Criteria: Rate the importance of the following criteria to your purchasing decisions.</i>		
• Reducing Greenhouse Gas Emissions (GHGs) (e.g., choosing electric vs. gas option)	3.10	2.73
• Environmental Impact (e.g., pollution, amount of natural resources used)	3.50	3.07
• Environmental Sustainability of Products Offered	3.89	2.47
• Product Disposal Costs	3.60	1.21
• Reducing Packaging Waste	3.20	1.25
• Recyclability or Reuse of Product	3.70	2.00
• Reducing GHG Impacts (e.g., choosing slower or combined shipping)	2.90	2.51
<b>SPP Implementation Index</b>	<b>3.27</b>	<b>2.83</b>



# 5-Yr Implementation Plan Timeline





# HVAC Budget Request Example

- Narrative
  - Include LCC Focus
  - Tie to City Goals
  - Note Benefit to Multiple Departments

<b>Project Name:</b>	HVAC REPLACEMENT PLAN					<b>Useful Life:</b>	10
<b>Strategic Goal:</b>	Sustainability						
<b>Initiative</b>	N/A						
<b>Description / Location:</b>	Hire a consultant to complete a city-wide inventory, including enterprise units, of all HVAC systems & create replacement plan using lifecycle costing to identify the most energy & cost efficient systems.						
<b>Justification and Relationship to City Plan Goals:</b>	This project will benefit all departments by eliminating the need for department managers to research and make HVAC decisions and through energy savings over time. It is a 2025 SPP IP High Priority energy-related Item; and supports clean energy goals in the 2023 Comprehensive Plan Energy Efficiency, 2022-2024 Middleton Sustainable City Plan, & 2018-32 Resolution.						
	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>Total</b>	
<b>Project Costs</b>	25,000	-	-	-	-	25,000	
<b>Funding Sources</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>Total</b>	
Capital Budget	25,000	-	-	-	-	25,000	



# Goals Document

E3 The Energy Plan 2020 includes energy efficiency priorities. The equipment replacement plan will prioritize decarbonization and efficiency.				
A	B	C	D	E
<b>Energy Goals - Resolution 2018-32 Addressing Global Warming Through Clean Energy</b>				
Category	Goal	Action	Progress (0-3)	Notes on Progress/Accountability
City Government	Energy Goals	The City will prioritize energy efficiency and conservation projects, programs, and outreach	2	The Energy Plan 2020 includes energy efficiency priorities. The equipment replacement plan will prioritize decarbonization and efficiency.
		The City will reduce its energy use for city operations at least 15% by 2030, and 50% by 2050	1	Look at trend line - My Meter/Energy Star Portfolio
		The City will meet 25 percent of its electric needs for City operations through renewable energy resources by 2025, 80 percent by 2030, and 100 percent by 2035	3	City currently meets 50% of its electric needs through renewable energy resources with a combination of rooftop PV and Renewable Energy Rider contracts with MGE.
		The City establishes goals to meet 66 percent of all City operations energy needs with renewable energy by 2030, 88 percent by 2035, and 100 percent by 2040	2	This 2020 goal will be challenging due to heating with natural gas and fleet emissions.
		The City will prioritize renewable resources and programs over purchasing renewable energy credits (RECs) to reduce reliance on RECs during the transition to 100 percent renewable resources	2	The City currently has 6 rooftop solar installations, and an agreement with MGE to purchase solar from the Morey Farm owned solar array. The CCC should incorporate renewable resources.
		The City will collaborate with other governmental and public entities locally and regionally to facilitate all energy measures	3	The City is very connected regionally through the Sustainable Leadership Collaborative, the Wisconsin Local Government Coalition, Green Tier, and through various joint grant projects with Dane County and State-wide.
		The City will prioritize local and micro-grid-based renewable energy projects over remote generation and transmission, and provide renewable energy and energy storage at key public facilities to reduce vulnerability to main electric grid failure	2	The City completed a community-scale microgrid feasibility study at the Middleton Business Park in 2021-22. The City attempted to install a microgrid at the Police Department.
City Government	Other Goals	The City will develop a resiliency plan to deal with anticipated changes associated with climate change.	3	The City develops regular hazard mitigation plans which include vulnerability and risk assessments with actions to address the greatest risks. This plan in conjunction with other City plans meets the requirement for LEED for Cities Resilience Planning.
		The City opposes the rollback of science and climate policy at the federal and state levels and affirms its ongoing commitment to the goals of the Paris Climate Agreement and the City's responsibility to meet its greenhouse gas reductions based on the Paris Climate Agreement	3	The City is a partner in the Wisconsin Local Government Coalition which leverages coalition resources to voice opposition to state and federal climate policy.

## ■ Contents

- Comprehensive Plan
- Energy Goals
- Strategic Goals
- Sustainable Middleton Plan
- Energy Plan 2020



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# Questions



# Just-In-Time Training Series

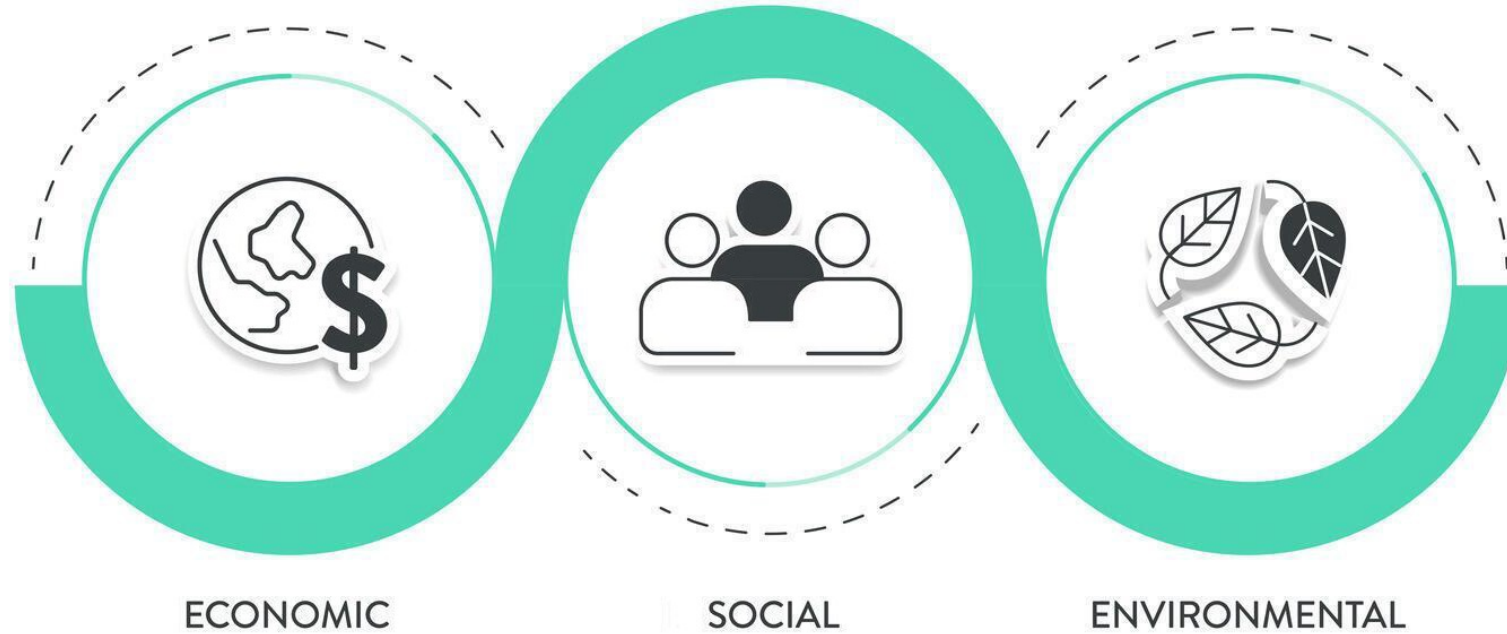
## No Training = No Implementation

- Sessions
  - Overview Introduction
  - Fleet Management
  - Budget Requests
  - RFP/Q/B Language
  - Construction & Maintenance
- Training Materials
  - Definitions, Examples, Support Docs, Explanations, Videos, & Guest Speakers





# Sustainable Management

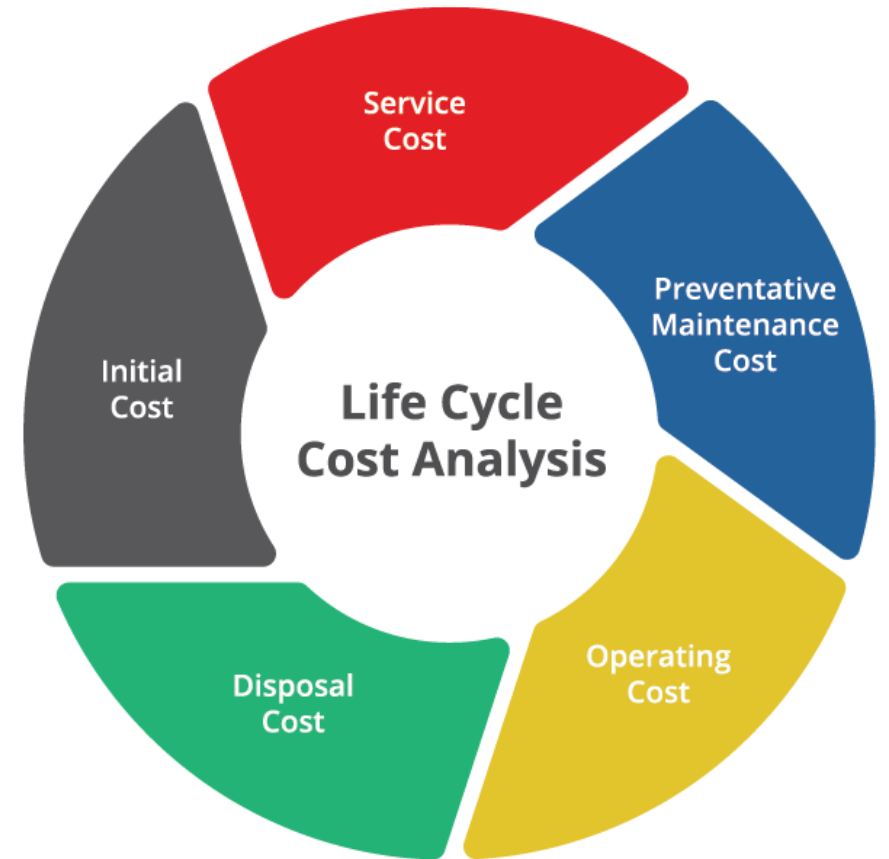




# Life Cycle Costing

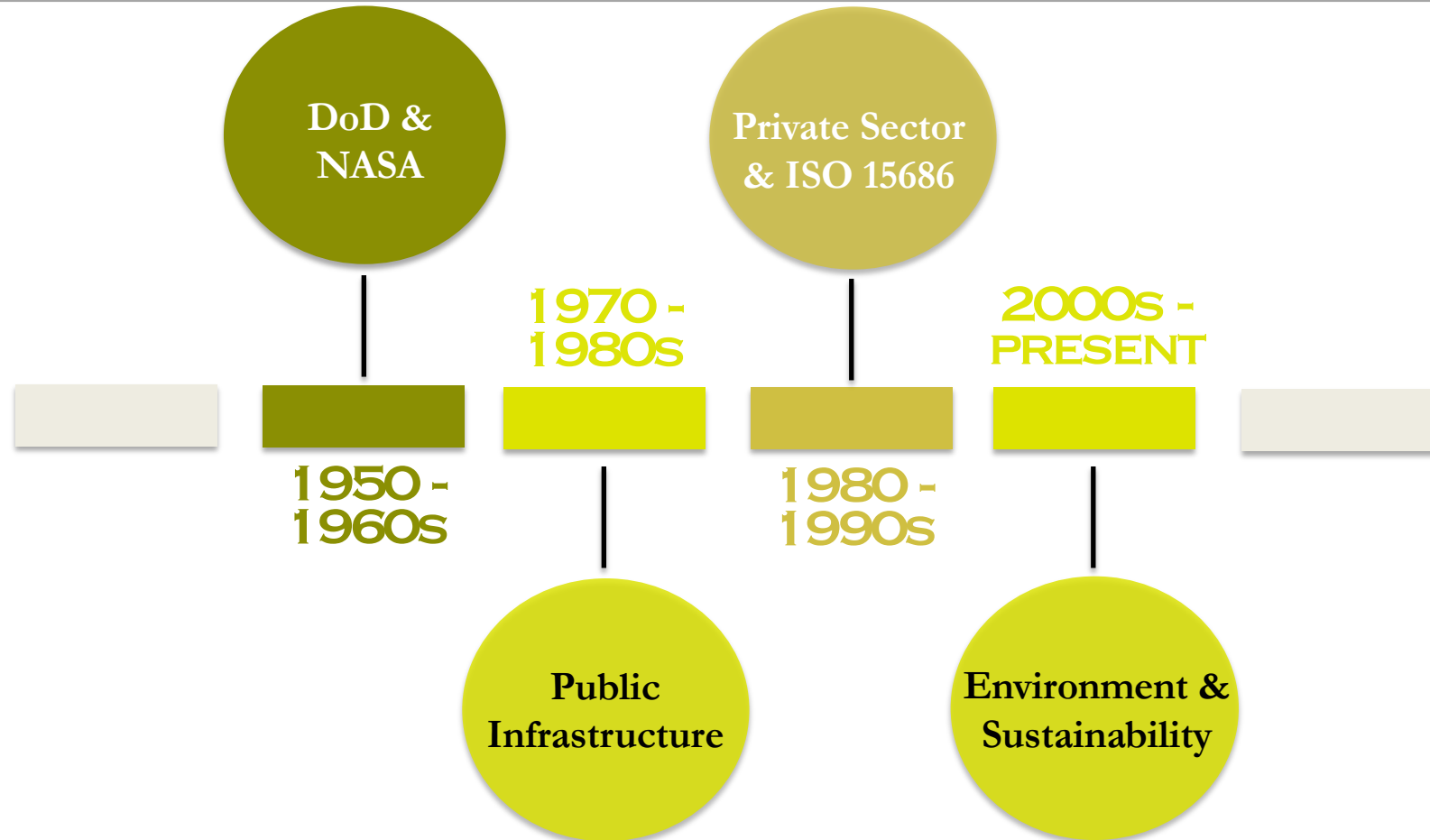
## Economic Sustainability

- Consider All Costs Associated with a Purchase
- Most Fiscally Responsible Costing Method Over Time





# Life Cycle Costing History





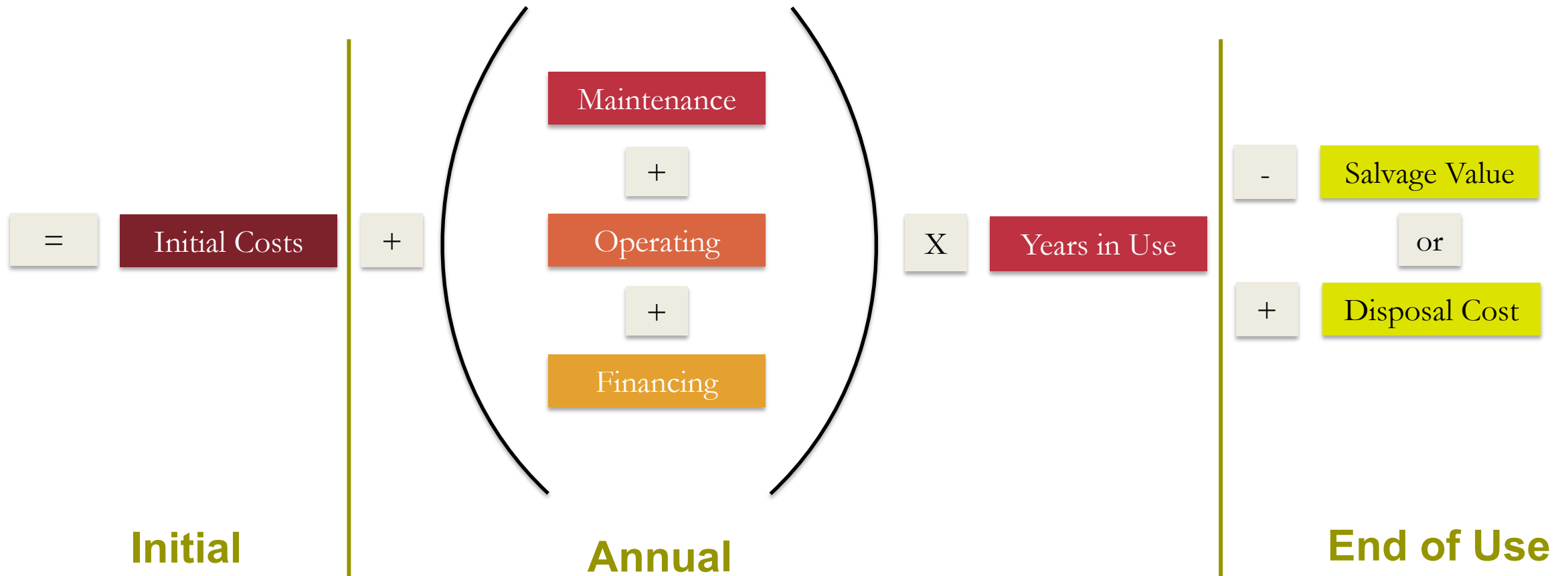
## LCC Wisconsin Statute

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The lifecycle cost of a purchase or capital construction project is an economic evaluation that *“considers all relevant costs associated with each purchase or building during its economic life, including, but not limited to, energy costs, acquisition and conversion, money, transportation, warehousing and distribution, training, operation and maintenance and disposition or resale”* (Wis. Stats. 13.48(2)(i)).



# LCC Simple Formula





# LCC HVAC Comparison Example

Costs	More Efficient HVAC System	Less Efficient HVAC System
Initial Purchase	\$ 20,000	\$ 10,000
Transportation	\$ -	\$ -
Installation	\$ -	\$ -
<b>Total Initial Costs</b>	<b>\$ 20,000</b>	<b>\$ 10,000</b>
Operating Expenses (e.g., Electricity)	\$ 600	\$ 1,200
Maintenance	\$ 900	\$ 1,750
Other Annual Costs (e.g., Finance)	\$ -	\$ -
<b>Total Annual Costs</b>	<b>\$ 1,500</b>	<b>\$ 2,950</b>
Rehabilitation Cost	\$ -	\$ -
Salvage Value	\$ 2,000	\$ 1,500
<b>Total Lifetime Costs</b>	<b>\$ 55,500</b>	<b>\$ 38,000</b>
Lifespan (Years)	25	10
<b>Lifecycle Cost per Year</b>	<b>\$ 2,220</b>	<b>\$ 3,800</b>
Payback Period for Additional Investment* \$10,000 difference/\$1,450 annual savings		<b>6.90</b> years
<i>Payback Formula = Additional Investment/Annual Savings</i>		



# Systems Thinking

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- Definition
  - Viewing a complex system as a whole rather than by its parts
    - Seeing how the elements influence each other
    - Recognizing relationships between elements



# Systems Thinking

---

- Definition
  - Viewing a **City** as a whole rather than by its parts
    - Seeing how the **departments & committees** influence each other
    - Recognizing relationships between **departments & committees**



# City Administrators

- System Thinkers
  - Embedded Language
  - Updated Materials
  - Becomes Part of Culture

## Budget Process Updates



27

- Budget Narratives
  - Intent to start including additional measures of performance outcomes vs. workload inputs
  - Department goals should reference City goals where appropriate
- Operating Budget Requests
  - Continue using budget initiative request forms to focus discussion in major items
  - Requests should include information on related personnel, operating, and capital costs
- Capital Budget Requests
  - Update forms to include lifecycle cost information for vehicles and HVAC equipment
  - Vehicle replacement plan items to include information on options and reason for recommendation
  - Utilize DRVE tool to provide additional information on vehicle option comparisons



# Systems Thinking

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- Benefits
  - Discover relationships
  - Identify synergies





# Education

- Show the Connections



## Resiliency Hub

- Social Sustainability
  - Adaptation
  - Resilience
- Benefits
  - Our Most Vulnerable Citizens
  - Most Departments



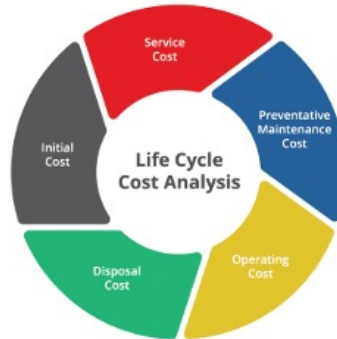
Systems Thinking Example 2



## Life Cycle Costing

### Economic Sustainability

- Consider All Costs Associated with a Purchase
- Most Fiscally Responsible Costing Method Over Time



## Well #8 Solar Array

- Environmental Sustainability
  - Mitigation
    - Harm Reduction

### Aerial views with potential PV mounting



\*Photo: ChatGPT & Photoshop Adaptation



# Lessons & Strategies

- Co-Develop with Staff
  - Improves Everything
  - Increases Buy-In
  - Develop Culture
- Expect Skepticism
  - Show Respect & Listen
- Provide Anonymity
  - Seek the Truth



- Plan Big & Systemically
- Show how Everything Fits Together
  - Act Small & Strategically
    - Pace Implementation
    - Start with High Impact/High Cost Procedures & Items
- Show Appreciation & Follow Up!
  - Change is Hard
    - Be Caring, Responsive & Helpful



---

thank  
you



---

## **Laura Buchholz**

MS – *Sustainable Management*

MBA – *Marketing & Innovation*

*Sustainability Committee Vice-Chair*

*City of Middleton*

[laurabuchholz@gmail.com](mailto:laurabuchholz@gmail.com)

[laura@strive4growth.com](mailto:laura@strive4growth.com)

## **Kelly Hilyard**

MLA

*Sustainability Coordinator*

*City of Middleton*

Office: 608.821.8362

Cell: 217.357.1860

[khilyard@cityofmiddleton.us](mailto:khilyard@cityofmiddleton.us)



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# Questions



## AGENDA ITEM REPORT

### MEETING DATE

August 26, 2025

### PREPARED BY

Nicholas Owen, Administrator

### AGENDA ITEM # 4.h

Update on Sustainability Plan

### BACKGROUND

[UniversCity Alliance](#)

### RECOMMENDATION

### ATTACHMENTS

None