CITY OF WILLARD

BOARD OF ALDERS REGULAR MEETING

July 06, 2026 at 6:00 PM

Willard City Hall, 224 W. Jackson St., Willard, MO

AGENDA

Update Posted on July 2,2026 at 1:00 p.m.

The tentative agenda of this meeting includes:

PLEDGE OF ALLEGIANCE

CALL THE MEETING TO ORDER

1. **ROLL CALL**
2. **AGENDA AMENDMENTS/APPROVAL OF AGENDA**
3. **CONSENT AGENDA:**

   "A Consent Agenda allows the Board of Aldermen to consider and approve routine items of business without discussion. Any member of the Board of Aldermen, the City Staff or the Public may request removal of any item from the Consent Agenda and request that it be considered under the Regular Agenda if discussion or debate of the item is desired. Items not removed from the Consent Agenda will stand approved upon motion by any Board member, second and unanimous vote to "approve the Consent Agenda as published or modified."

   3A. BOARD OF ALDERS REGULAR MEETING MINUTES 06/22/2026
4. **CITIZEN INPUT**
5. **DISCUSSION**

   5A. CAPSTONE PROJECT

   5B. EMPLOYEE HANDBOOK

   5C. ON CALL PROCEDURES

   5D. TAKE HOME VEHICLE POLICY
6. **RESOLUTIONS**
7. **ORDINANCES**

   7A. AN ORDINANCE OF THE CITY OF WILLARD, MISSOURI, ADOPTING THE CITY OF WILLARD ECONOMIC DEVELOPMENT INCENTIVE POLICY.

   7B. AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE WATER SUPERVISOR POSITION

   7C. AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE SEWER SUPERVISOR POSITION

   7D. AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE STREETS SUPERVISOR POSITION

7E. AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A POSITION TITLE CHANGE AND COMPENSATION ADJUSTMENT FOR EMILY MILLS

8. **CITY ADMINISTRATOR REMARKS**
9. **NEW BUSINESS**
10. **UNFINISHED BUSINESS**
11. **RECESS OPEN SESSION**
12. **OPEN CLOSED SESSION PURSUANT TO RSMO SECTION 610.021 (1) LEGAL (3) PERSONNEL (13) PERSONNEL**
13. **CALL THE MEETING TO ORDER**
14. **ROLL CALL**
15. **CLOSE THE CLOSED SESSION AND RECONVENE THE OPEN SESSION**
16. **ADJOURN MEETING**

If you have special needs which require accommodation, please notify personnel at the City Hall. Representatives of the news media may obtain copies of this notice by contacting the City Clerk at 417-742-5302.

Courtney Myers, City Clerk

CITY OF WILLARD

BOARD OF ALDERS REGULAR MEETING

June 22, 2026 at 6:00 PM

Willard City Hall, 224 W. Jackson St., Willard, MO

MINUTES

Staff Present: City Administrator Wesley Young, City Attorney Holly Dodge, P&Z Assist Tammy Swisher, Planning and Zoning Director Mike Ruesch, CFO Genia Mount, Project Manager Steve Bodenhamer, Parks Director Edward Sands and Police Officer Shannon Shipley Courts Terry Forshee, Public Works Director Trevor Huffman
Citizens Present: Rachel Tayor, Steve Taylor, Larry Whitman

PLEDGE OF ALLEGIANCE

Mayor Smith led the Pledge of Allegiance.

CALL THE MEETING TO ORDER

Mayor Smith called the meeting to order at 6:00 pm and asked the P&Z Assist Tammy Swisher to conduct the Roll call.

1. ROLL CALL

P&Z Assist Tammy Swisher conducted the roll call. Present: Mayor Troy Smith, Casey Biellier, Jeremy Hill, David Keene, Rachel Mathison and Carol Wilson.
Absent: Joyce Lancaster
P&Z Assist Tammy Swisher confirmed that a quorum was present.

2. AGENDA AMENDMENTS/APPROVAL OF AGENDA

Mayor Smith asked for a motion to approve the agenda, Motion was made by Alder Casey Bieller and seconded by Alder Jeremy Hill, Motion carried with a 5-0 vote. Voting Aye: Alders Biellier, Hill, Keene, Mathison, and Wilson.

3. CONSENT AGENDA:

"A Consent Agenda allows the Board of Aldermen to consider and approve routine items of business without discussion. Any member of the Board of Aldermen, the City Staff or the Public may request removal of any item from the Consent Agenda and request that it be considered under the Regular Agenda if discussion or debate of the item is desired. Items not removed from the Consent Agenda will stand approved upon motion by any Board member, second and unanimous vote to "approve the Consent Agenda as published or modified."

A. BOARD OF ALDERS REGULAR MEETING MINUTES 06/08/2026

B. PREVIOUS AND CURRENT MONTHS FINANCIALS

FINANCIAL SUMMARIES & STATEMENTS

OUTSTANDING INVOICES, CHECKS AND DRAFT PAID INVOICES

CHECK REGISTER

UTILITIES ADJUSTMENT REPORT

C. DEPARTMENT HEAD REPORTS SECOND QUARTER

COURT CLERK

Court Clerk, Terry Forshee, gave the quarterly report

PUBLIC WORKS

PARKS

Parks Director, Edward Sands, gave the quarterly report

PLANNING & ZONING

Planning Director, Mike Ruesch, gave the quarterly report

POLICE

Major, Shannon Shipley, gave the quarterly report

3. **CITIZEN INPUT**
   a. Rachel Taylor would like to have the nuisance animal ordinance updated so that it includes that all animals not just dogs be kept on their own property
   b. Steve Taylor wanted people to know dogs have to be leashed but cats and other animals can roam free for 12 hours at a time

5. **DISCUSSION**

A. INDEPENDENT AUDITOR'S REPORT, CITY AUDIT (DECKER & PACE)

City Auditor gave an updated report to the board of Alders on the Annual City.

B. AN ORDINANCE OF THE CITY OF WILLARD, MISSOURI, ADOPTING THE CITY OF WILLARD EMPLOYEE HANDBOOK AND ESTABLISHING PERSONNEL POLICIES FOR CITY EMPLOYEES.

HR Director Caitlin Goebel updated the Board of Alders on the employee handbook.

6. **PROJECT MANAGER REPORT**

A. SANITARY SEWER UPDATE (STEVE BODENHAMER) (7MIN)

Project Manager Steve Bodenhamer updated on the Meadows and 94-lift station progress.

7. **MEADOWS/VILLA SUBDIVISION UPDATE**

A. PRELIMINARY FINDINGS MEADOWS/VILLA UPDATE (RAY LYNCH)

Ray Lynch reported on the preliminary findings on the Meadows/Villa

8. **RESOLUTIONS**

A. A RESOLUTION OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, ESTABLISHING, AUTHORIZING, AND GOVERNING THE USE, INTERPRETATION, AND ADMINISTRATION OF JOB DESCRIPTIONS FOR MUNICIPAL POSITIONS.

Mayor Smith asked for a motion to approve the First Read of the resolution. Motion to approve a First Read was made by Alder Jeremy Hill and seconded by Alder Casey Bieller. Motion carried/resolution approved with a 5-0 vote Voting Aye: Alders Biellier, Hill, Keene, Mathison and Wilson.

9. **ORDINANCE (Was Changed to Just a Discussion)**

A. AN ORDINANCE ESTABLISHING A STANDBY, ON-CALL AND TAKE-HOME VEHICLE POLICY FOR STAFF OF THE CITY OF WILLARD EXCEPT POLICE PERSONNEL (FIRST AND SECOND READ)

Alders agreed that they would like to see a work-study on 7/6/2026 done on this.

10. **CITY ADMINISTRATOR REMARKS**

City Administrator Wes Young talked about working with Commerce Bank with investment ladders. Color Graphics is working on the City Logo signage.

11. NEW BUSINESS

Planning Director Mike Ruesch is working on Capstone Project that he will present at the work-study meeting.

12. UNFINISHED BUSINESS

Work session will be on July 6, 2026

13. RECESS OPEN SESSION

Alder Casey Bieller motioned to recess Open Session and enter Closed Session. Motion was seconded by Alder Rachel Mathison, Motion carried with a 6-0 vote. Voting Aye: Alders Biellier, Hill, Keene, Mathison and Wilson. Open session recessed at 9:00 pm

14. OPEN CLOSED SESSION PURSUANT TO RSMO SECTION 610.021 (1) LEGAL 9:00pm

15. CALL THE MEETING TO ORDER

16. ROLL CALL

17. CLOSE THE CLOSED SESSION AND RECONVENE THE OPEN SESSION

18. ADJOURN MEETING

Motion was made to adjourn the meeting by Alder Jeremy Hill and seconded by Alder Casey Bieller. Motion carried with a 5-0 vote. Voting Aye: Alders Biellier, Hill, Keene, Mathison and Wilson. Meeting adjourned at 9:20 pm

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Courtney Myers, City Clerk

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Mike Ruesch

SUBJECT: Capstone Recap

1) **Recommended Solutions**

I. Salary Survey Review

. As directed by the Board of Aldermen, the city is looking into surrounding salaries for all positions as a comparison of where we sit in regard to monetary compensation.

II. Healthcare Compensation Review

. As a result of employee input and board support new healthcare has been evaluated and will be coming before the board for review.

III. Enhance Workplace Culture and Trust

- Establish a City Mission, Vision, and Values
  - Have a meeting giving all employees an opportunity to discuss possible ideas for a new Mission, Vision and supporting values for Willard.
  - Tie new ideas into the comprehensive plan
-
- Establish a yearly leadership training that will focus on collaboration and communication. Attendees may include the Board of Aldermen, Department Heads, Supervisors' City Attorney and other guests as invited by the City Administrator. Have training that supports the city mission, vision, values, teamwork, inter department communication and other ideas that stimulate a "We not Me" atmosphere.
- Define accountability baseline through department heads by
  - Upholding the city mission, vision and values
  - Providing high quality leadership for their team
  - Constantly look for ways to improve
  - Practice active listening and inter department communication
  - Effectively manage project by creating processes and systems for sustainability and success
- Continue the annual Board of Aldermen and Planning Commission work meeting to continue legal training and focus on the comprehensive plan.
- Establish an avenue for employee feedback

    - Continue employee input through STAY interviews, personal interaction and exit interview to document potential opportunities

- Developing a Sense of Pride and Belonging by first "Noticing" the efforts of employees as they strive to improve. "Affirm" their ideas and contributions to the team. Communicate with people individually, that they are "Needed and Essential" to the team's overall success. (The Power of Mattering, Zack Mercurio)
- Establish recognition and reward programs for our People
    -
    - Begin an employee recognition program where individuals may be nominated by peers or the public for a job well done. Make QR codes available via website for citizens and others.
    - Celebrate the small wins in department head meetings and directly with his peers.
    - "Get to know spotlight" of different employees as a way of breaking the ice.

Employees who strongly agree that their employer cares about their overall well-being were 69% less likely to search for a new job (Gallup Poll US perception of organizations caring about wellbeing)

- All staff Leadership Training
    - Utilize talented, rising leaders to teach leadership
    - Basic leadership training for all staff
- Advanced leadership training for current and future leaders help in their supervisory roles. These may include:
    - Supervisory Leadership Training (SLT)
    - 3-Day Emerging Leaders Training
    - EDGE Leadership Training

Commented [CA1]: is this equally applicable to administrative staff? or should we focus on a different track for those not in the field?

IV Promote Service & Recreation Opportunities

- Develop a plan for service opportunities, allow citizens to weigh in on opportunities. Strongly encourage senior leaders to lead out in participation.
- Monitor and publicize efforts, celebrate successes and accept feedback on how to improve and revise where needed.
- Begin to schedule recreational get togethers to build relationships and add increase morale. Have different departments host said event. Everyone with their families is invited to participate.

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Caitlin Goebel

SUBJECT:

EMPLOYEE POLICY MANUAL

City of Willard

EMPLOYEE POLICY MANUAL

Adopted xxx
date

Contents

City Information and Welcome Message

Welcome to the City of Willard.

Public service carries a unique responsibility. The work we do directly impacts the daily lives of our residents, businesses, and community partners. Because of that, we hold ourselves to a high standard of professionalism, accountability, and consistency in how we operate.

This personnel manual is intended to provide clear guidance on expectations, policies, and procedures that support both employees and the organization. It is not designed to cover every possible situation, but rather to establish a framework for decision-making that is fair, consistent, and aligned with the City's mission.

Employees are expected to understand and follow these policies, to exercise sound judgment in their work, and to approach their responsibilities with integrity and respect for the public we serve.

This manual is intended to serve as a practical guide to employment with the City of Willard. It outlines policies, procedures, and expectations to support consistent and effective operations.

This manual is not a contract of employment and does not create a guarantee of employment for any specific duration. Employment with the City is at-will, meaning that either the employee or the City may end the employment relationship at any time, with or without cause, and with or without notice, subject to applicable law.

As the City grows, our expectations and operations will continue to evolve with it. This manual is one of the tools we use to ensure that our growth is managed thoughtfully and responsibly.

Thank you for your commitment to serving the City of Willard.

1. PURPOSE

These Personnel Policies are established to:

1.1 Ensure effective city administration by implementing standardized personnel policies and procedures applicable to all City employees.
1.2 Establish a consistent system for position classification and compensation, based on the complexity and responsibility of tasks assigned to each role within City service.
1.3 Promote fair and measured recruitment, hiring, assignment, advancement, compensation, and retention practices based on individual qualifications and performance. All personnel actions shall be conducted without discrimination based on race, color, religion, creed, sex, age, national origin, sexual orientation, marital status, or physical, mental, or sensory disability unrelated to job performance.

Commented [WC1]: gender identity?

2. ADMINISTRATION

2.1 **Authority to Adopt and Amend**

This Personnel Manual is adopted by the Board of Aldermen and may be amended from time to time in accordance with applicable law, City ordinance, and any procedures established in this manual.

2.2 **Administration of the Manual**

Human Resources ("HR") is responsible for the day-to-day administration of this manual, including policy guidance, recordkeeping, compliance support, and assistance to employees, supervisors, and department heads.

2.3 **Interpretation and Implementation**

Unless otherwise provided by law, ordinance, or specific policy, the City Administrator has authority to interpret, implement, and apply this manual in the administration of personnel matters. The City Administrator may issue administrative procedures or guidance consistent with this manual.

2.4 **Scope and Applicability**

This manual applies to all City employees unless a specific section states otherwise or unless a position is governed by separate law, ordinance, contract, or official action of the City.

2.5 **Supersession of Prior Policies**

This manual supersedes prior personnel policies, procedures, practices, and standards of the City to the extent they are inconsistent with this manual, unless expressly preserved by ordinance, resolution, or specific policy language.

2.6 **No Contract; At-Will Employment**

This manual is intended as a statement of current personnel policies and guidelines only. It is not a contract of employment and does not create a property interest in employment or a guarantee of employment for any specific duration. Unless otherwise provided by written agreement or applicable law, employment with the City is at will.

3. DEFINITIONS

For the purposes of these policies, the following definitions apply:

Anniversary Date: The date an employee's employment with the City began.

Appointing Authority: The individual or body with legal authority to appoint or dismiss employees. The Mayor and Board of Aldermen retain the legal authority to appoint and remove appointive officers. The City Administrator has authority to appoint, discharge, and discipline City employees, subject to review by the Board of Aldermen as established in this manual and City Code Section 115.185.

Appointive Officer: Any person employed by the City and appointed by the Mayor and Board of Aldermen pursuant to RSMo § 79.230. Appointive officers are subject to the supervision and discipline of the City Administrator unless otherwise provided by law.

Board: The Board of Aldermen of the City of Willard, Missouri.

City: The City of Willard, Missouri.

Class: A group of positions within the same occupation or profession that share similar duties, responsibilities, titles, and qualification requirements.

Class Series: A progression of classes within an occupation that reflects increasing levels of difficulty, responsibility, and qualification requirements.

Class Specification: A written description of a job class that includes typical duties, responsibilities, and minimum qualifications.

Classification Banding: A system that groups job classifications to support career progression and compensation administration. Movement within a classification band, as determined by the City Administrator and approved by the Board, is not considered a promotion or reclassification unless otherwise stated.

Classification Plan: The complete list of job classes maintained by the City, together with their class specifications and related classification rules.

Classification Study: A review conducted to determine the appropriate classification of a position based on assigned duties, responsibilities, and qualifications.

Classified Position: A position covered by the City's personnel policies and assigned to a class within the classification plan.

Compensation Schedule: The official pay structure established by the City, including pay ranges, grades, bands, steps, or other compensation levels assigned to classifications or positions.

Days: Unless otherwise specified, calendar days.

Demotion: The reassignment of an employee to a position in a lower pay range, whether voluntary or involuntary.

Department: A distinct operational unit of the City, typically led by a department head and established by ordinance or other official City action.

Department Head: An individual responsible for leading a City department and reporting directly to the City Administrator, unless otherwise established by law or ordinance.

Effective Date: The date on which a specified action, policy, or employment decision takes effect.

Eligible: Meeting the minimum qualifications or requirements for a position, benefit, or personnel action.

Emergency Appointment: A temporary appointment made under urgent or extraordinary circumstances when normal hiring procedures cannot reasonably be followed.

Employee: Any individual lawfully employed by the City.

Entry Level: The beginning pay level or classification level at which an employee enters a position or job series.

Exempt Employee: An employee who is exempt from overtime requirements under the Fair Labor Standards Act (FLSA) and other applicable law.

Grade / Pay Grade: A level within the City's compensation structure that assigns a position to a designated salary or wage range based on job duties, responsibility, and qualifications.

Grant-Funded Position: A position funded in whole or in significant part through grant funds. Continued employment in such a position is contingent upon continued funding, unless otherwise determined by the City.

Hours Worked: Time actually spent performing job duties. Paid leave and other non-work time are not considered hours worked unless required by law or expressly provided by City policy.

Incumbent: The employee currently assigned to a specific position.

Merit Increase / Performance Salary Increase: A compensation increase based on performance, subject to the City's evaluation process, applicable policy, and budget approval.

Minimum Job Performance: The baseline level of performance required to satisfactorily meet the standards of a position.

Non-Exempt Employee: An employee who is eligible for overtime compensation under the Fair Labor Standards Act (FLSA) and other applicable law.

Overtime: Authorized hours worked by a non-exempt employee in excess of forty (40) hours in a workweek, or as otherwise required by law.

Part-Time Employee: An employee regularly scheduled to work fewer than thirty (30) hours per week.

Pay Band: A broader compensation grouping that may include multiple pay grades and allow flexibility in pay administration based on qualifications, experience, performance, and market conditions.

Position: A group of duties and responsibilities assigned by the City to be performed by one employee.

Position Description: A written summary of the duties, responsibilities, reporting relationships, and qualifications associated with a specific position.

Probationary Period: A defined introductory or trial period following initial appointment, promotion, or reassignment during which an employee's performance and suitability are evaluated.

Promotion: The advancement of an employee to a position with greater responsibility and typically a higher pay grade or pay range.

Provisional Appointment: A temporary appointment made to meet an immediate operational need pending further review, recruitment, or permanent action.

Range / Pay Range / Salary Range: The minimum and maximum compensation levels assigned to a position, class, pay grade, or band.

Reclassification: A change in the classification of a position based on significant changes in duties, responsibilities, or qualification requirements.

Regular Employee: An employee who has successfully completed the applicable probationary period and continues in employment in a regular full-time or regular part-time position, if recognized by City policy.

Reinstatement: The return of a former employee to City employment in the same or a related position after separation.

Resignation: A voluntary separation from employment initiated by the employee.

Seasonal Employee / Seasonal Appointment: An employee hired for work tied to seasonal or temporary operational needs. Seasonal employees are not guaranteed continued employment beyond the assigned season or period and may be excluded from some benefits or policy provisions as stated elsewhere in this manual.

Step: A designated compensation level within a pay range or grade.

Supervisor: An employee assigned responsibility for directing, overseeing, or evaluating the work of other employees.

Temporary Employee: An individual hired for a limited period or specific short-term need, generally not to exceed six (6) months unless otherwise approved.

Termination: An involuntary separation from employment initiated by the City.

Transfer: The reassignment of an employee from one position to another position, typically within the same pay grade or classification structure unless otherwise stated.

Underfilling: The temporary assignment of an employee to a lower classification or level within a class series when the employee does not yet meet the qualifications for the higher classification but is expected to do so through training, certification, or experience.

4. CLASSIFICATION PLAN

4.1 Establishment of the Classification Plan

4.1.1 The City Administrator shall prepare, maintain, and revise, as necessary, a Position Classification Plan covering all positions in the classified service. Any changes to the plan require approval from the Board of Alders.

4.1.2 Every position within the classified service shall be assigned to an appropriate classification within the plan. Classifications shall be determined based on the complexity of duties, level of authority, and scope of responsibility, ensuring that:

- Positions within the same classification require comparable qualifications.
- A uniform pay schedule applies fairly to all positions within the same classification.

4.1.3 Each classification shall be described through a Class Specification, which defines:

- The nature of work and typical duties performed.
- The minimum preferred qualifications (knowledge, skills, abilities, education, and training) for appointment to the position.

4.1.4 Official job titles and pay ranges assigned to classifications shall be used consistently for:

- Original appointments and promotions.
- Payroll processing.
- Personnel records and status updates.

4.1.5 **City Positions and Classification Categories:** All City positions fall into one of the following classification categories:

Commented [WC2]: is this an internal measure? It may be confusing with EEO Categories. I would suggest either using EEO definitions or not including them.

Executive/Senior Level Officials and Managers - Top-tier leaders who set organizational strategy and policy.

- Typically within two reporting levels of the CEO.
  - Examples: Chief Executive Officers, Chief Operating Officers, Chief Financial Officers, division presidents, managing partners legalclarity.org.

First/Mid-Level Officials and Managers - Managers who implement strategies set by senior leadership.

- Oversee departments, business units, or regional operations.
  - Examples: Department heads, plant managers, branch managers, first-line managers legalclarity.org.

Professionals - Roles requiring a four-year degree or equivalent specialized experience.

  - Examples: Engineers, accountants, attorneys, physicians, scientists legalclarity.org.

Technicians - Positions requiring specialized technical knowledge, often supporting professional-level work.

  - Examples: Lab technicians, IT support specialists, paralegals legalclarity.org

Sales Workers - Employees primarily engaged in direct, non-managerial selling.

  - Examples: Retail associates, insurance agents, sales representatives legalclarity.org

Administrative Support Workers - Clerical and office support roles.

- Examples: Receptionists, bookkeepers, data entry clerks, secretaries legalclarity.org

Craft Workers - Skilled manual workers in trades requiring specialized training.

- Examples: Electricians, carpenters, machinists workable.com.

Operatives - Semi-skilled workers performing repetitive tasks under supervision.

- Examples: Assembly line workers, machine operators workable.com.

Laborers and Helpers - Unskilled or minimally skilled workers assisting higher-level employees.

- Examples: Warehouse laborers, construction helpers workable.com.

Service Workers - Employees providing personal or protective services.

- Examples: Janitors, security guards, food service workers workable.com.

4.2 Classification of Existing and New Positions

4.2.1 The City Administrator shall review position classifications when:

- A significant change in job duties and responsibilities occurs.
- A new position is created or an existing position is proposed for elimination.

If such a change is identified, the City Administrator shall:

- Provide a report to the Board of Alders detailing the classification adjustments.
- Investigate the classification of a position upon written request from a regular employee or at their own discretion.

4.2.2 Classification investigations may consider the following factors:

- Nature, complexity, and variety of duties.
- Level of supervision received and exercised.
- Knowledge, skills, and expertise required.
- Education, experience, and professional training.
- Scope of responsibility and decision-making authority.
- Working conditions and unique job demands.

The City Administrator shall determine the appropriate classification and assign the corresponding compensation level. Any significant modification to a class or the establishment/elimination of a classification requires Board approval.

4.3 Reclassification and Reallocation

4.3.1 **Reclassification**
A reclassification occurs when an employee assumes higher-level duties and responsibilities beyond the current classification. If a reclassification is warranted, it may

be treated as a promotion and may be subject to competitive selection among eligible candidates.

4.3.2 **Reallocation**
A reallocation occurs when a salary or classification study results in an adjustment to a position's pay range without a substantial change in job duties or responsibilities.

- The affected employee will be placed at the nearest rate in the new salary range that is closest or equal to their current pay rate.

4.4 Independent Contractors

4.4.1 The City may engage independent contractors where authorized by law. Contractors are not City employees and are subject to the terms outlined in their contracts.

Independent contractors **do not qualify** for:

- City tax withholdings (unless a valid W-9 is submitted, otherwise 28% will be withheld).
- City-provided workers' compensation insurance.
- Participation in group insurance benefits available to City employees.
- LAGERS Retirement System contributions.
- Accrual of vacation or sick leave.
- Unemployment compensation coverage.

All independent contractor agreements must be in written contract form, specifying the scope of work, duration, and compensation.

4.5 Seasonal Employment

Definition

A seasonal employee is an individual hired to perform duties tied to specific seasonal needs. Seasonal employment is temporary, and there is no guarantee of reappointment in future seasons.

Employment Duration and Reapplication

1. Seasonal employees are hired only for the designated season or time period stated at the time of hire.
2. Employment periods may be:
    - Defined by **seasonal demand** (e.g., summer, winter, etc.).
    - Linked to a **specific date range** outlined in the employment offer.
3. The employment period must be clearly stated in a written offer letter, with a copy retained in the employee's HUMAN RESOURCES file.
4. If no clear end date is specified, seasonal employment shall not exceed six (6) months.
5. Extensions beyond six (6) months require written approval from:

- The Chief Financial Officer (CFO).
- The City Administrator (CA).
- Provided the employee meets all employment eligibility requirements set by Human Resources

Employment Status and Conditions

1. Seasonal employment **does not** create an expectation of continued employment or future reappointment.
2. Seasonal employees are **not eligible** for benefits provided to full-time regular employees.
3. All seasonal employees must adhere to City policies regarding workplace conduct, safety, and operational procedures.

Oversight and Administration

1. Department heads must inform seasonal employees of their employment duration and conditions at the time of hire.
2. HUMAN RESOURCES shall oversee seasonal hiring, reappointments, and compliance with City policies, budgetary constraints and applicable employment laws.
3. The City reserves the right to terminate seasonal employment at any time **without notice**. Seasonal employment with the City is at-will.

5. COMPENSATION

5.1 Compensation Plan

5.1.1 The Compensation Plan shall consist of an approved schedule of pay ranges assigned to each position based on the classification plan. This plan shall be developed and maintained by the City Administrator and requires approval from the Board of Alders. Each position in the classification plan shall be assigned an appropriate pay range based on the relative duties and responsibilities of each class.

5.1.2 The City operates on a biweekly payroll schedule, with 26 payroll periods per year.

- The payroll week runs from 12:00 a.m. Sunday through midnight Saturday.
- Employee payroll shall be issued on the Friday following each two-week payroll period.

5.2 Application of Pay Rates

5.2.1 Each classified employee shall be paid at an hourly rate within the designated pay range for their assigned position, except as otherwise provided in this policy.

5.2.2 **Reclassification:**

- If a position is reclassified to a lower pay rate due to changes in job duties beyond the employee's control, the employee shall continue to be paid at their current rate for six months, provided they meet the following conditions:
  a. They have performed satisfactorily in their previous role.
  b. They have held the higher classification for at least six months.
  c. The reclassification is due to organizational needs, not employee performance.

- At the end of the six-month period, the employee's salary will be adjusted to fit within the new classification pay range.

5.2.3 Merit-Based Salary Increase

- Under the Merit-Based Salary Increase system, salary adjustments will be tied to individual performance evaluations, rather than automatic step progression.

- Merit increases will be:

  - Recommended by direct supervisors based on employee performance.
  - Reviewed and approved by the City Administrator to ensure fairness and consistency.
  - Budget-dependent, with final approval subject to City financial resources.

5.4 Merit Bonuses for Employees at the Top of Their Pay Range

Employees who reach the maximum pay level for their classification will not be eligible for further merit-based raises. Instead, these employees will receive a one-time lump sum merit payment equal to the percentage of merit increase they would have received as a salary adjustment. The payment will be issued in one paycheck following the approval of the merit increase and will not affect the employee's base salary.

5.4.1 Example of Merit Payment Calculation

Scenario: An Employee at the Top of Their Pay Range

- Employee A is at the maximum pay level in their classification.
- Based on performance evaluation and specific criteria and objectives met, Employee A is approved for up to a 3% merit increase.
- Since Employee A cannot receive a salary increase, they instead receive a one-time merit payment up to 3% of their current annual salary.

Calculation:

- Employee A's annual salary at the top of their pay range: $60,000
- Merit increase percentage: 3%
- Merit Payment Calculation: $60,000 × 3% = $1,800
- Employee A will receive a one-time merit payment of $1,800 on their paycheck.

5.4.2 Ensuring Fairness and Transparency

- The same merit evaluation criteria will apply to both salary adjustments and merit payments to ensure fairness.
- Supervisors and department heads will receive training on the merit evaluation process to ensure consistency in awarding raises and merit payments.
- The City Administrator shall review all merit recommendations in the following ranges before approval to maintain budgetary control and equity across departments.
    - Unsatisfactory
    - Above Average
    - Role Model

5.5 Overtime Compensation and Compensatory Time

All policies governing overtime/compensatory time shall follow the requirements of the Fair Labor Standards Act (FLSA).

5.6 Salary (Exempt) Employee Leave – ETO

- **Eligibility -** All full-time exempt (salary) employees are eligible for Exempt Time Off (ETO).
- **ETO Front-Load at Anniversary Date -** Upon hire, exempt employees receive a one-time front-load of up to 160 hours of ETO, prorated based upon how many pay periods remain in the Calendar Year. This front-load applies only during the employee's first Calendar Year.
- **ETO Accrual - ETO accrues each pay period based on Years of Service:**

Years of Service	Front-Load (Jan 1)	Additional Annual Accrual	Per-Pay Accrual (26 pays)
>1 year	160 hrs	**104 hrs**	**4.00 hrs**
1–4 years	160 hrs	**184 hrs**	**7.08 hrs**
5-9 years	160 hrs	**224 hrs**	**8.62 hrs**
10-12 years	160 hrs	**244 hrs**	**9.38 hrs**
12-14 years	160 hrs	**264 hrs**	**10.15 hrs**
15 + years	160 hrs	**304 hrs**	**11.69 hrs**

Accrual continues even when the employee reaches the maximum balance, up to the year-end payout threshold.

First Year Annual Usage Limit - Exempt employees may **use up to 160 hours** of ETO in their first year.

Carryover - Exempt employees may carry over up to 500 hours of ETO into the next Calendar Year.

Year-End Payout for Hours Above 500

At the end of the last pay period in December:

- **Any ETO hours above 500 will be paid out at the employee's regular hourly rate**

Separation of Employment -

Salary employees will be paid for all unused ETO up to 160 hours upon separation, provided they meet the requirements of the City's separation policy.

Use of ETO

- ETO may be used in 15-minute increments.
- ETO must be approved in advance by the Department Head, or their designee, whenever the need for leave is foreseeable. For unexpected absences due to illness, emergency, or other unforeseen circumstances, employees must notify their Department Head, or their designee, as soon as practicable and follow departmental call-in procedures.

- ETO is not tied to hours worked and is not compensatory for time.

5.7 Hourly (Non-Exempt) Employee Leave – PTO

Eligibility - All full-time hourly (non-exempt) employees are eligible for Paid Time Off (PTO).

PTO Accrual - Hourly employees accrue PTO based on Years of Service:

Years of Service	Additional Annual Accrual	Per-Pay Accrual (26 pays)
>1 year	104 hrs	4.00 hrs
1–4 years	184 hrs	7.08 hrs
5-9 years	224 hrs	8.62 hrs
10-12 years	244 hrs	9.38 hrs
12-14 years	264 hrs	10.15 hrs
15 + years	304 hrs	11.69 hrs

**These accruals include the former personal days and sick leave.*

PTO Carryover

- Hourly employees may carry over up to **500 hours** of PTO into the next Calendar Year.
- Carryover is calculated at the last pay period in December.

PTO Payout at Separation

Hourly employees will be paid for all unused PTO up to 160 hours upon separation, provided they meet the requirements of the City's separation policy.

PTO Usage

- PTO may be used in **15-minute increments.**
- PTO may be used for any purpose: vacation, illness, personal needs, appointments, or family care.
- PTO must be approved in advance by the Department Head, or their designee, whenever the need for leave is foreseeable. For unexpected absences due to illness, emergency, or other unforeseen circumstances, employees must notify their Department Head, or their designee, as soon as practicable and follow departmental call-in procedures. PTO used for unexpected absences may be approved after the fact when timely notice is provided and the absence is otherwise consistent with this policy.
- PTO may be used for up to **80 consecutive hours** without additional approval. Requests exceeding 80 consecutive hours must be approved in writing by the Department Head and/or the City Administrator. Approval will be based on business needs and potential disruption to the City's day-to-day operations.

Overtime

Hourly employees receive:

- 1.5× overtime pay for all hours worked over 40 in a workweek.
- Hourly employees may elect at the beginning of the Calendar Year to accrue compensatory time in lieu of overtime pay, up to a maximum of **40 hours**. Once an employee reaches the 40-hour compensatory time maximum, any additional overtime hours worked during the remainder of the Calendar Year will be paid as overtime.
- Any unused compensatory time remaining at the end of the Calendar Year will be paid out in December at the employee's regular hourly rate.

5.8 Holidays

Observed Holidays

The City observes the following holidays:

- **New Year's Day**
- **Martin Luther King Jr. Day**
- **President's Day**
- **Memorial Day**
- **Juneteenth**
- **Independence Day**
- **Labor Day**
- **Columbus Day**
- **Veterans Day**
- **Thanksgiving Day**
- **Friday after Thanksgiving**
- **Christmas Eve**
- **Christmas Day**
- **New Year's Eve**

Holiday Pay Rules

5.8.1. City closure on a regularly scheduled workday - Employees who are regularly scheduled to work on a City-recognized holiday and do not work because the City is closed will receive:

- **Up to 10 hours of holiday pay at the employee's regular rate, based on the employee's normal scheduled shift.**

5.8.2 Work performed on a holiday - Employees required to work on a City-recognized holiday will receive:

- **Two times their regular hourly rate for all hours worked on the holiday.**
  - **Example:** Employee whose regular pay is $15.00/hr works 8 hours on the day designated as the holiday according to the City schedule will then be paid the equivalent of $30.00/hr for 8 hours. Where it would normally be 8 x $15/hr = 120/day it would be $240.00 for the day.

- **Police officers may elect to work the holiday at straight time and receive a floating holiday to be used within the same pay period. This election must be submitted in writing with payroll; otherwise, holiday pay as described above will apply.**

5.8.3 Holiday falls on a day the employee is not normally scheduled to work - If the holiday falls on a day the employee is not normally scheduled to work, and the employee's schedule is not adjusted:

- **The employee receives no holiday pay.**
- **The employee receives no additional compensation.**

5.8.4 No schedule manipulation - Departments may not adjust an employee's schedule solely to avoid, reduce, or increase holiday pay.

5.8.5 Overtime interaction - Holiday hours do not count toward overtime calculations. Only hours actually worked count toward overtime thresholds.

Summary Table

Scenario	Pay Outcome
City closed, employees not working due to closure	**Up to 10 hours at regular rate**
Employee works on holiday	**2× regular rate for all hours worked**
Employee is not scheduled to work that day and schedule is unchanged	**No holiday pay**
Schedule changed to avoid or increase holiday pay	**Not permitted**

5.9.3 Corrective Actions

If an employee is found to be abusing leave:

1. **First Offense:** Verbal counseling and written notice of attendance concerns.
2. **Second Offense:** A formal written warning in their personnel file.
3. **Repeated Violations:** May result in additional disciplinary action up to and including termination for excessive absenteeism.

5.9.4 Employee Rights

Employees may provide a written response to any corrective action taken. Employees with medical conditions or family emergencies should notify HUMAN RESOURCES to discuss reasonable accommodations under FMLA or other applicable policies.

Commented [WC3]: This is clear for attendance issues but what about other infractions

5.10 Emergency Medical Leave Program (EMLP)

Commented [CA4]: Significantly modified, and provides a route for employees to donate leave to the bank. Makes it donation funded

The Emergency Medical Leave Program (EMLP) provides additional paid leave to employees facing a personal or immediate family member's life-threatening or catastrophic illness or injury. The program is funded through a City-administered Leave Bank, to which employees may voluntarily donate accrued annual or sick leave.

5.10.1 Eligibility for Emergency Medical Leave

Employees may apply for Emergency Medical Leave if they:

- Are a full-time employee who has satisfactorily completed at least six (6) months of continuous service.
- Has, or will have, exhausted all accrued sick leave, vacation leave, and compensatory time during the emergency medical leave.
- Provide documentation from a licensed medical professional confirming a:
    - Life-threatening illness, injury, or condition affecting the employee or an immediate family member.
    - Catastrophic medical condition requiring prolonged hospitalization or extensive treatment.
    - Anticipate leave time required for treatment of the illness, injury or condition.

5.10.2 Donation Program

To ensure the continued availability of Emergency Medical Leave, the City will maintain a Leave Bank, funded by voluntary donations of accrued annual and sick leave from employees.

Employee Leave Donations

- Employees may donate any accrued leave in full-hour increments to the Leave Bank.
- Employees must, after making a donation, retain a minimum balance of 80 hours of PTO/ETO
- Donations are voluntary and non-reversible.

5.11 Family and Medical Leave (FMLA)

The City of Willard complies with the Family and Medical Leave Act (FMLA), which provides eligible employees with up to 12 weeks of unpaid, job-protected leave for qualifying medical or family-related reasons.

5.11.1 Eligibility Requirements

Employees are eligible for FMLA leave if they:

1. Have been employed by the City of Willard for at least 12 months.
2. Have worked at least 1,250 hours in the past 12 months.

5.11.2 Qualifying Reasons for FMLA Leave

Eligible employees may take up to 12 weeks of unpaid leave within a 12-month period for:

- The birth, adoption, or foster care placement of a child.
- A serious health condition that prevents the employee from performing job duties.
- Care for a spouse, child, or parent with a serious health condition.

5.11.3 Requesting FMLA Leave

- Employees must notify the City Administrator or HUMAN RESOURCES as soon as possible.
- If leave is foreseeable, employees must provide at least 30 days' advance notice.
- Employees must complete the FMLA Request Form and provide medical certification within 15 days of the request.

5.11.4 Continuation of Benefits

- The City will continue health insurance coverage under the same conditions as if the employee were actively working.
- Employees must continue paying their portion of insurance premiums.
- Employees who do not return from FMLA leave may be required to reimburse the City for employer-paid health premiums.
- An employee is officially considered to have "returned to work" for the purposes of these policies if they return to duty for at least 30 calendar days.
- If FMLA leave is unpaid, the employee must reimburse the City upon return for any employee portion of premiums or other amounts advanced by the City during the unpaid leave period. Reimbursement arrangements must be coordinated with Human Resources.
    - Note: An employee who retires immediately at the end of their FMLA leave, or who retires within the first 30 days of returning, is still legally deemed to have "returned to work," and the City will not seek reimbursement for premiums in those instances.

5.11.5 Return to Work & Fit-for-Duty Requirement

Commented [WC5]: Do we allow for employees to pay once they return to work or must it be while out on leave?

Commented [WC6]: How do we enforce this?

- Employees must provide a fit-for-duty certification before returning to work if the leave was for their own medical condition.
- The City will restore the employee to their original position or an equivalent role with the same pay and benefits.

5.12 Military Leave

The City of Willard fully complies with the Uniformed Services Employment and Reemployment Rights Act (USERRA) and protects the job rights of employees absent for military service.

5.12.1 Eligibility & Leave Benefits

Employees are eligible for military leave if they are:

- A member of the Armed Forces, Reserves, or National Guard and called to active duty, training, or military service.

5.12.2 Duration of Leave & Reemployment Rights

- Military leave may last up to five (5) years.
- Employees returning from military leave will be reinstated to the same or equivalent position as required by federal law.
- The City will continue paying its portion of health insurance premiums for military leaves under 30 days.
- For military leave exceeding 30 days, employees may continue health insurance coverage at their own expense.

Commented [WC7]: Will they need to reimburse or no?

5.12.3 Requesting Military Leave

- Employees must provide a copy of military orders and a written leave request to the City Administrator.
- Additional details regarding reemployment rights are available through the HUMAN RESOURCES Department.

5.13 Jury Duty Leave

Employees summoned for jury duty or as a court witness shall receive leave with pay.

5.13.1 Pay & Time Off

- Employees will receive their regular salary for the duration of jury service.
- Employees must provide a copy of the jury summons to their supervisor.

5.13.2 Court Witness Leave

- Employees subpoenaed to testify in a work-related case will receive paid leave.
- Employees appearing in court for personal matters must use vacation, comp time if available, or take unpaid leave.

5.14 Unpaid Leave of Absence

Employees may request an unpaid leave of absence for special and extraordinary circumstances.

5.14.1 Approval & Duration

- Requests must be submitted in writing to the City Administrator.
- Employees must exhaust all accrued vacation and sick leave before an unpaid leave request is approved.
- The City Administrator may, at their sole discretion, authorize additional unpaid leave. Such extensions shall only be granted upon a written finding of exigent circumstances where the strict application of the limit would result in undue hardship or where the leave is deemed to be in the best interest of the City. Any additional leave granted under this provision is subject to the same "exhaustion of benefits" requirements of other leave types and does not establish a precedent for future requests.

5.15 Witness and Crime Victim Leave

Under Missouri law, eligible employees may take unpaid time off from work to comply with a criminal proceeding by honoring a subpoena to testify, attending the proceeding, or participating in the preparation for the proceeding.

Employees are eligible for time off under this policy if they are: (1) the victim of a crime, (2) a witness of a crime, (3) an immediate family member of the victim of a crime. An immediate family member is defined as a spouse, child, sibling, parent or grandparent, or legal guardian. When possible, employees should provide advance written notice to HUMAN RESOURCES for such compliance. This leave will not run concurrently with other leave.

5.16 Victims of Domestic Abuse

Employees who are victims of domestic or sexual violence, or have a family or household member who is a victim of domestic or sexual violence whose interests are not adverse to the employee as it relates to the domestic or sexual violence, may take up to two (2) weeks of unpaid leave within any 12-month period to:

A. Seek medical attention for, or recover from, physical or psychological injuries caused by the domestic or sexual violence to the employee or the employee’s family or household member;
B. Obtain services from a victim services organization for the employee or the employee’s family or household member;

C. Obtain psychological or other counseling for the employee or the employee's family or household member;
D. Participate in safety planning, temporarily or permanently relocating, or taking other actions to increase the safety of the employee or employee's family or household member from future domestic or sexual violence or to ensure economic security; or
E. Seek legal assistance or remedies to ensure the health and safety of the employee or the employee's family or household member, including preparing for or participating in any civil or criminal legal proceeding related to or derived from domestic or sexual violence.

When feasible, 48 hours' notice of the need for such time off is required. Documentation to support the need for leave may also be required prior to the employee taking leave, which may include a police report, protection order, or court order. Vacation can be used to the extent available, and leave may be taken intermittently. This leave generally does not run concurrently with any other leave. The City will keep all submitted information in conjunction with this leave confidential to the extent possible.

5.16.1 Domestic Violence in the Workplace

The City recognizes that domestic violence can spill over into the workplace. We are committed to supporting employees by providing reasonable safety accommodations. If you are experiencing domestic violence, please contact HUMAN RESOURCES to discuss available resources or flexible scheduling to assist in your safety planning.

5.16.2 Protective and Restraining Orders

Employees who have obtained a Protective Order or Restraining Order that lists City property as a protected location are strongly encouraged to provide a copy to the HUMAN RESOURCES Department and the Police Department. This allows City leadership to take necessary precautions to ensure the employee's safety while at work.

5.17 Bereavement Leave

Employees may be granted paid leave following the death of an immediate family member.

5.17.1 Duration of Bereavement Leave

- **Up to 5 working days** for the death of:
  - Spouse or significant other
  - Child or stepchild
  - Parent or stepparent
- **Up to 3 working days** for the death of:
  - Sibling or stepsibling
  - Grandparent or grandchild

- Parent-in-law or sibling-in-law
- Aunt, uncle, or dependent relative residing with the employee

5.17.2 Documentation Requirement

- Documentation (e.g., obituary or funeral notice) should be provided for the personnel record.

5.18 Volunteer Firefighter Job Protection

Employees will be provided with unpaid time off to perform duties as a volunteer firefighter with a municipal, volunteer, rural, or fire protection association, MO-1 Disaster Medical Assistance Team, MO Task Force One, Urban Search and Rescue Team, or when activated to a national disaster response by FEMA. When possible, employees should provide advance written notice to the City Clerk of such service. In addition to the written notice, a certification should be provided at the end of leave and include the date and time that the emergency was responded to. This leave does not run concurrently with other leave.

5.19 Retirement Plan (LAGERS)

1. The City of Willard participates in the Missouri Local Government Employees Retirement System (LAGERS) to provide retirement benefits to full-time employees.
2. Enrollment in LAGERS is mandatory for all full-time employees upon completing six (6) months of continuous employment with the City.

1. Employee contributions to LAGERS are set at four percent (4%) of gross wages, which typically is deducted automatically from each paycheck. Effective 1/1/2024 the City has been paying the employee contribution in full. If budget constraints arise, the City reserves the right to limit the employee contribution it covers, or temporarily/permanently suspend the City's payment of the employee contribution.

3. The City contributes to the retirement plan at a rate determined by LAGERS, in accordance with the City's agreement with the system.
4. This program is not optional, and participation is a condition of employment for all full-time employees.
5. Employees with questions regarding their retirement benefits, vesting requirements, or contribution rates should contact the Human Resources or Finance Department for additional information.

5.20 Leave Buyback Policy ***(Updated Section) (UNKNOWN)***

5.20.1 Purpose

The Leave Buyback Program allows eligible employees to sell back a portion of their accrued but unused Sick, Comp or Annual leave in exchange for a lump-sum payment. The program is designed to provide employees with flexibility in managing their leave while ensuring operational and financial sustainability for the City.

Employees who have completed at least one (1) year of service may request a quarterly leave payout of up to 40 hours, provided they maintain a minimum balance of 40 hours of sick leave and vacation leave after such payout.

Requests for leave buyback may be made incrementally, or on one single request, and may be for one or a combination of leave types. However, the employee shall not request, nor be entitled to, a total leave payout of more than 40 hours per quarter.

5.20.2 Eligibility

Employees must meet the following criteria to participate in the Leave Buyback Program:

1. Must be a full-time employee with at least one (1) year of continuous service.
2. Must retain a minimum balance of 40 hours (1 week) each of sick and vacation leave after selling back leave.
3. Must not have received a performance-related disciplinary action in the past 12 months.

5.20.3 Conditions of Buyback

1. Employees may sell back a maximum of 40 hours (1 week) per calendar quarter.
2. Buyback payments will be processed at the employee's base hourly rate at the time of the request.
    1. Non-exempt employees compensatory time shall be processed as indicated above (Section 5.5.2)
3. Leave hours sold back will not count as hours worked for overtime calculation purposes.

5.20.4 Request & Approval Process

1. Employees must submit a Leave Buyback Request Form to HUMAN RESOURCES.
2. HUMAN RESOURCES and the Finance Department will review requests to ensure compliance with eligibility criteria and available budget.
3. Approved requests will be processed in the next payroll cycle following approval.
4. If budget constraints arise, the City reserves the right to limit the number of buyback requests, reduce the approved amount of the buyback requests or temporarily suspend the program.

5.20.5 Financial Considerations & Limitations

1. The City reserves the right to adjust buyback periods, limits, or eligibility based on budgetary constraints at any time with or without advance notice.

2. Employees are encouraged to utilize their vacation leave for rest and recovery, and the program should not be relied upon as a substitute for taking time off.

5.20.6 Example Scenario of Leave Buyback

- **Employee A** has accrued 160 hours (4 weeks) of vacation leave and wishes to sell back 40 hours.
- After the buyback, Employee A will retain 120 hours (3 weeks) of vacation leave.
- If their hourly wage is $25, the buyback payment will be:
  - 40 hours × $25/hour = $1,000 (before taxes and deductions)
- The payment will be included in their regular paycheck following approval.
- The leave buyback payment will be subject to all applicable federal, state, and other withholdings, as well as any other required deductions which are due at the time of the buyback. Employees should understand that this payment may increase the total taxable wages for the pay period, potentially resulting in higher-than-anticipated withholdings. The City will not modify, reduce, or make temporary adjustments to any tax or deduction requirements related to the leave buyback payment. Employees are responsible for any tax liabilities incurred as a result of their participation in the program.
- **Employee B** has accrued 80 hours (2 weeks) of vacation leave and 48 hours (1 week and 1 day) of sick time and wishes to sell back 40 hours of sick time.
- After the buyback, Employee B would have less than 40 hours of sick time so they can either be approved for 8 hours of sick time only, or take an additional 32 hours from their vacation time.

5.21 Insurance Benefits

The City of Willard provides a benefits package to eligible full-time employees. Benefits and coverage levels are subject to change, and employees should refer to the official plan documents for specific eligibility requirements and coverage details.

5.21.1 General Eligibility

- To qualify for City-sponsored benefits, employees must be classified as full-time employees.

- Employees separating from employment may continue certain benefits at their own expense, subject to applicable policies and laws.

5.21.2 Health & Life Insurance

- The City currently provides individual health and life insurance benefits to all eligible full-time employees.
- The City fully covers the cost of individual health and approved limit life insurance premiums for eligible employees.
- Employees may elect to:
  - Purchase additional coverage for dependents.
  - Participate in optional vision and dental plans at their own expense through payroll deduction.
- The City reserves the right to adjust the portion of premiums covered based on future financial conditions.

Effective Date of Coverage

- Health and life insurance coverage becomes effective on the first day of the month following the first month of employment.
- Enrollment details and necessary forms are available through the Human Resources Department.

5.21.3 Social Security, Medicare, and Medicaid Contributions

- The City of Willard fully complies with federal Social Security, Medicare, and Medicaid requirements.
- Employees will have Social Security (FICA) and Medicare contributions deducted from each paycheck at the federally established rate.
- The City will contribute to these programs in accordance with federal law and applicable wage bases.

5.21.4 Workers' Compensation & Unemployment Insurance

A. Workers' Compensation Insurance

- The City of Willard provides workers' compensation coverage as required by state law to protect employees who experience work-related injuries or illnesses.
- Coverage includes medical, surgical, and hospital treatment, as well as compensation for lost wages due to an approved work-related injury.

Employee Responsibilities in the Event of a Work-Related Injury

1. **Immediate Notification:** Employees must immediately report any work-related injury or illness to their Department Head.
   - The Department Head must notify HUMAN RESOURCES and the City Administrator or, in the absence of the City Administrator, the Mayor.
   - If the injury occurs outside normal business hours, the employee should report the injury as soon as possible or request a family member or friend to do so.
2. **Medical Treatment:**
   - Employees requiring medical attention should visit a City-approved physician or medical facility.
   - In emergencies, employees should seek care at the nearest emergency medical facility.
3. **Mandatory Testing:**
   - Employees who receive medical attention for a work-related injury shall be subject to drug and alcohol testing where permitted by law.
4. **Failure to Report Injuries:**
   - Employees who fail to report an on-the-job injury in a timely manner may jeopardize their eligibility for workers' compensation benefits.

B. Unemployment Insurance

- The City of Willard participates in the State of Missouri's Unemployment Insurance Program.
- Employees who become unemployed through no fault of their own may qualify for unemployment benefits, as determined by state regulations.
- Employees with questions about their workers' compensation or unemployment benefits should contact the Human Resources Department.

6. REIMBURSEMENT & TRAVEL EXPENSES *(New Section)*

6.1 Expense Maximums

- When an employee is required to travel more than 50 miles from the City Office for official City business, they shall not spend in excess of the per diem maximum set at the same rate paid to State of Missouri employees.
  - At the time of writing this is a $59/day maximum
    - $13 for breakfast
    - $15 for lunch
    - $26 for dinner
    - $5 for incidentals
    - Tips shall not exceed 15%
- Employees must submit a request in advance, detailing the purpose of travel and estimated duration as well as the anticipated expenses where known.

6.2 Reimbursement

- Employees must attempt to use an available City vehicle for work-related travel before using a personal vehicle.
- If a City vehicle is not available, the employee may use their personal vehicle but must receive prior approval from the City Administrator or Director of Finance.
- If an employee fails to use an available City vehicle, mileage reimbursement may be denied at the discretion of the City Administrator.
- Mileage will be reimbursed at the standard rate set by the State of Missouri.
- Employees must submit a mileage log and itemized receipts for reimbursement.
  - Non-itemized meal receipts shall not be reimbursed.
  - Hotel receipts showing an unpaid balance shall not be reimbursed.
  - Alcohol purchases shall not be reimbursed.

6.3 Other Business-Related Expenses

- Employees required to purchase work-related items (e.g., tools, office supplies, or meals while conducting City business) may request reimbursement.
- Purchases should be approved in advance and the employee must attempt to receive sales tax exemption from the purchase.
- All requests must include:
  - Original receipts.

- Explanation of the expense and how it relates to City business.
- Approval from a Department Head (or City Administrator for Department Heads).

7. GENERAL PROVISIONS

7.1 Hours of Work

1. A work hour is defined as any hour worked, recorded to the nearest quarter-hour.
2. A workday is a 24-hour period beginning at 12:00 a.m. and ending at 11:59 p.m.
3. A workweek consists of seven (7) consecutive days, beginning on Sunday at 12:00 a.m. and ending on Saturday at 11:59 p.m.
4. The standard workweek for City of Willard employees is 40 hours.
5. The normal work schedule for City Hall employees is Monday through Friday, 8:00 a.m. to 5:00 p.m., with a one-hour unpaid lunch.
6. Department Heads, with City Administrator approval, may modify individual work schedules to better meet operational needs.

7.2 Attendance and Punctuality

1. Employees are expected to maintain regular attendance and punctuality.
2. Absences, tardiness, or early departures (whether excused or unexcused) may result in disciplinary action, up to and including termination.
3. Employees must notify their Direct Supervisor or Department Head of any planned absence, tardiness, or early departure as far in advance as possible, and no later than one (1) hour before the scheduled start time.
4. In cases of emergency, employees must notify their Direct Supervisor, Department Head, or as a last resort HUMAN RESOURCES or the City Administrator as soon as possible.
5. If an absence extends beyond one (1) work day, employees must inform their Direct Supervisor and provide an expected return date.
6. A physician’s statement may be required for any illness-related absence, regardless of duration.
7. If absent for three (3) consecutive days due to illness, employee will be required to return with a doctors note.
8. Employees absent for three (3) consecutive days without notification will be deemed to have voluntarily resigned (job abandonment).
9. Employees with excessive absences or tardiness may be subject to progressive disciplinary action.

7.3 Meal Breaks

1. Unpaid meal breaks are provided for employees at the discretion of the Department Head.
2. The minimum meal break length is 30 minutes, but Department Heads may adjust the length as needed.
3. Employees on call during their entire shift may be granted a paid meal break, provided they:
   - Remain on work premises unless authorized otherwise, and
   - Are available to respond to duty calls during meal breaks.
4. Failure to respond to duty calls during a paid meal break may result in disciplinary action.

7.5 Voluntary At-Will Employment

1. Employment with the City of Willard is at-will, meaning:
   - The City may terminate employment at any time, with or without cause.
   - Employees may resign at any time, with or without cause.
2. No oral or written statements made by City employees or officers alter this at-will status unless:
   - The statement is in writing, and
   - Signed by the Mayor and approved by the Board of Alders.

7.6 Equal Employment Opportunity (EEO)

The City of Willard expressly prohibits any form of unlawful employee discrimination based on race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty or status as a covered veteran in accordance with applicable federal, state and local laws. The City of Willard complies with applicable state and local laws governing nondiscrimination in employment. Improper interference with the ability of City of Willard employees to perform their expected job duties because of any of these characteristics will not be tolerated.

1. The City of Willard provides equal employment opportunities (EEO) to all employees and applicants, without regard to:
   - Race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty, or military/veteran status.

2. The City complies with all applicable federal, state, and local anti-discrimination laws.
3. This policy applies to all aspects of employment, including:
    - Hiring, placement, promotion, termination, layoffs, transfers, compensation, and training.
4. Discrimination or harassment is strictly prohibited, and employees should report concerns to:
    - The City Administrator, or Human Resources
    - If the City Administrator is involved, an Alder or the Mayor or Human Resources.
5. Employees who report in good faith, and employees who cooperate with investigations into, alleged violations of this policy will not be retaliated against.
6. If the City of Willard determines that a violation of this policy has occurred, it will take appropriate disciplinary action against the offending party in accordance with disciplinary policy up to and including termination and/or loss or merit eligibility.

7.7 Pregnancy Accommodation

The City will provide reasonable accommodations to female employees related to pregnancy, childbirth, or related medical conditions, to the extent the accommodation can be made without imposing an undue hardship on the City.

When an employee provides a request for a reasonable accommodation to their supervisor or to HUMAN RESOURCES. The City will explore with the employee the possible means of providing the reasonable accommodation requested, which may include, but are not limited to:

- allowing more frequent breaks or periodic rest;
- assisting with manual labor;
- modifying job duties;
- modifying work hours/schedules;
- temporary transfer to a less strenuous or less hazardous position; or
- providing a leave of absence.

The City shall require the employee to provide a medical certification in connection with a request for reasonable accommodation that includes the following:

- the date the reasonable accommodation became medically advisable.
- the probable duration of the reasonable accommodation; and
- an explanatory statement as to the medical advisability of reasonable accommodation.

If leave is provided as a reasonable accommodation, such leave may run concurrently with any leave where permitted by state and federal law.

For more information, or if you require an accommodation, please contact your supervisor or the HUMAN RESOURCES department.

7.8 Policy Against Workplace Harassment

All City employees have a right to work in an environment free from all forms of discrimination and conduct which can be considered harassing, coercive, or disruptive. Consistent with this philosophy, employees of the City are always expected to treat others with dignity and respect. Civility in the workplace is a major principle of our culture. Harassment based on citizenship status, age, race, religion, color, sex, pregnancy, gender identity or sexual orientation, disability, genetics, national origin or ancestry, veteran service or status or any other characteristic protected by laws applicable to the City will not be tolerated. Discrimination includes, but is not limited to, making employment decisions, providing employment opportunities or privileges, or taking employment related action based on any of these protected statuses.

This policy applies to all applicants and employees, whether related to conduct engaged in by fellow employees, managers, supervisors, co-employees, or someone not directly connected to the City but who does work with the City such as by clients, customers, vendors, or other non-employees. Conduct prohibited by this policy is unacceptable in the workplace and in any work-related setting outside of the City premises, including business trips, business-related meetings, and business-related social events.

We encourage bystanders to become involved when they can possibly mitigate a situation in violation of this policy. Effective communication is an important tool in the effort to prevent or cease escalation of bad behavior, or to stop repeated abusive behavior.

7.8.1 Sexual Harassment

Sexual harassment of any form or nature constitutes discrimination under the law and is not permitted in our workplace. The City defines sexual harassment as unwelcome sexual advances, requests for sexual favors, and other verbal, visual, or physical conduct of a sexual nature constitute sexual harassment when: (1) submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment; (2) submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or (3) such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment. The following examples of sexual harassment are intended to be guidelines, and are not an exclusive listing, when determining whether there has been a violation of this policy:

- Verbal sexual harassment includes sexual innuendoes; sexually suggestive comments; jokes of a sexual nature; sexual propositions; repeated unwelcome requests for dates; lewd remarks and threats; comments about a person’s body; comments about an individuals’ sexual experiences, prowess or preferences; and requests for any type of sexual favors.
- Nonverbal sexual harassment includes the distribution, display or discussion of any written or graphic material, including calendars, posters and cartoons that are sexually suggestive or show hostility toward an individual or group because of sex; suggestive or insulting sounds; leering; staring; whistling; obscene gestures; content in letters or notes,

email, photos, text messages, tweets, internet postings; or other form of communication that is sexual in nature and offensive.
- Physical sexual harassment includes unwelcome, unwanted physical contact, including touching, pinching, patting, brushing up against, hugging, cornering, kissing, fondling and physical assault of a sexual nature.

Courteous, mutually respectful, pleasant, non-coercive interactions between employees, regardless of gender identity, that are appropriate in the workplace and welcomed by both parties are not considered to be harassment, including sexual harassment.

7.8.2 Harassment Based on Other Protected Characteristics

Harassment based on other protected characteristics is also strictly prohibited. Under this policy, harassment includes verbal, written or physical conduct that denigrates or shows hostility or aversion toward an individual based on citizenship status, age, race, religion, color, disability, genetics, national origin or ancestry, veteran service or status or any other characteristic protected by applicable law and that 1) has the purpose or effect of creating an intimidating, hostile or offensive work environment; 2) has the purpose or effect of unreasonably interfering with an individual's work performance; or 3) otherwise adversely affects an individual's employment opportunities.

This prohibited conduct shall include, but is not limited to, the following, whether occurring in the workplace or otherwise on City time, using the City equipment, or otherwise related to the City events:

- Epithets, hate words, racial or ethnic slurs;
- Negative stereotyping;
- Threatening, intimidating or hostile acts;
- Bullying;
- Denigrating jokes and display or circulation in the workplace of written or graphic material that denigrates or shows hostility or aversion toward an individual or group based on their protected status and impairs an employee’s ability to perform his or her job.

Examples of statements that clearly indicate an employee wants to file an official report include:

- “I want to file an official report about this incident.”
- “I am making an official complaint under the City’s harassment policy.”
- “I want this matter formally investigated by Human Resources.”
- “Please treat this as an official report of harassment, discrimination, or retaliation.”
- “I am requesting that the City document and review this as a formal complaint.”

7.8.3 Reporting Procedure

Any individual who feels that he or she has been the subject of conduct or has witnessed conduct or been made aware of conduct prohibited by this, or any employee policy, whether it is conduct of another employee, client, vendor, or anyone else associated with the City, should bring the matter to the immediate attention of the HUMAN RESOURCES department. The employee’s report regarding a harassment or discrimination incident may be made by a verbal, emailed, or formal written complaint; a formal written and dated complaint is recommended. Please see our reporting procedure for clarification.

7.8.4 Investigation

The City will conduct a prompt, thorough and neutral investigation of any complaint and will act as appropriate based upon the outcome of the investigation. It will be necessary to discuss the complaint with the complainant, the alleged offender, and/or possibly other employees.

The City has a compelling interest in protecting the integrity of the investigation and endeavors to protect witnesses from harassment, intimidation, and retaliation, to keep evidence from being destroyed, to ensure that testimony is not fabricated, and to prevent a cover-up. Employees are expected to cooperate fully in any investigation. False and bad faith complaints of harassment, discrimination or retaliation will be subject to disciplinary action up to and including termination.

7.8.4.1 Follow-up

Once the investigation is completed, the City will inform the employee making the complaint and the alleged offender of the results of the investigation. Any individual found to have engaged in any prohibited form of harassment or retaliation, either directly or indirectly, or to have engaged in behavior that is inappropriate or disruptive or otherwise prohibited by this or other City policies, regardless of whether that behavior constitutes harassment prohibited by law, may be subject to appropriate disciplinary actions. The City will thereafter take prompt and appropriate remedial action based on the outcome of the investigation, including but not limited to, disciplinary action, up to and including termination, loss of merit raise eligibility, formal training, and correcting any adverse employment action which may have been taken against the person making the complaint.

The City recognizes that in some cases, despite thorough investigation, it may be impossible to determine whether the alleged violations of its non-discrimination/non-harassment policy have occurred. In such cases, the City may act to reinforce the effectiveness of the policy and to prevent future violations.

7.8.5 Policy Coverage

All employees of the City (whether full time, part time, seasonal, contractual etc.), including supervisors and managers, are covered by this policy and are prohibited from engaging in any form of harassing, discriminatory, or retaliatory conduct. No supervisor or other member of management has the authority to suggest to any applicant or employee that employment or advancement will be affected by the individual entering (or refusing to enter into) a personal relationship with the supervisor or manager, or for tolerating (or refusing to tolerate) conduct or communication that might violate this policy. Such conduct is a direct violation of this policy.

Non-employees, such as clients, consultants, customers, and vendors, are also covered by this policy. The City prohibits harassment, discrimination, or retaliation of employees in connection with their work by non-employees. Immediately report any harassing or discriminating behavior by non-employees, including contractor or subcontractor employees. Any employee who experiences or observes harassment, discrimination, or retaliation should report it using the steps listed in section 7.8.3.

7.8.6 No Retaliation

The City forbids and will not tolerate any form of retaliation against anyone who has made a complaint, reported harassment, or who has cooperated in the investigation of discrimination or harassment complaints. The City may periodically monitor to ensure the person making a complaint of discrimination or harassment and any witnesses are not being subject to unlawful retaliation and that there is no repeat of the inappropriate conduct. However, if an employee feels that he or she has been retaliated against, the employee should file a complaint using the procedure set forth above and a prompt and an investigation will be conducted.

If you have any concern that the City's Non-Discrimination/Non-Harassment policy may have been violated by anyone, you must immediately report the matter. Due to the serious nature of harassment, discrimination, and retaliation, you must report your concerns to the HUMAN RESOURCES Department.

You should report any actions that you believe may violate the City's policy no matter how slight the actions may seem.

The City will investigate the report and then take prompt remedial action where appropriate or necessary. The City will protect the confidentiality of employees reporting suspected violations to the extent possible consistent with the City's investigation.

You will not be penalized or retaliated against for reporting improper conduct, harassment, discrimination, retaliation, or other actions that you believe may violate this policy.

The City is serious about enforcing our policy against harassment. Persons who violate this or any other city policy are subject to discipline, up to and including termination. The City cannot resolve a potential policy violation unless the City knows about it. You are responsible for reporting possible policy violations to us so that we can take appropriate actions to address your concerns.

7.9 Solicitation Policy

1. Employees may not solicit, distribute materials, or post notices on City property unless part of a City-approved event.

2. Any postings must be pre-approved by the City Administrator or City Clerk.

7.10 Nepotism Policy

1. No employee may directly supervise a family member.

2. Family includes: parents, children, siblings, spouse, in-laws, grandparents, grandchildren, aunts, uncles, nieces, nephews, step-relatives, and foster children.

3. If a prohibited relationship is created (e.g., through marriage), the situation must be resolved within 30 days.

    - Resolution may include the transfer of one employee to a different department, a change in the reporting structure, or the voluntary resignation of one party.

    - If the parties cannot agree on a resolution within 30 days, the City Administrator reserves the right to determine the appropriate reassignment or termination based on the operational needs of the City.

4. If a prohibited relationship is found to have occurred and not been reported, or was always present (e.g. a supervisor knowingly hiring/supervising a family member), the nepotism cannot be cured and the supervisor shall be immediately terminated.

7.10.1 Employment of Relatives

Applicants will not be hired if they are related to a Supervisor or Department Head in the same department. The City Administrator may approve a hire, provided that hire does not at any time report to a related supervisor or department head. A related supervisor or department head may also not be involved in evaluating the employee's performance.

7.11 Dress Code

1. Each Department Head, with approval from the City Administrator, will establish dress code policies.

2. Dress codes must be job-appropriate, professional, and prioritize safety.

3. Dress codes must comply with Uniforms Policy where applicable.

7.12 Oath Requirement

Every police officer must take the legally prescribed oath of office before assuming duties.

7.13 Political Activities

1. Employees may not:

    - Use City resources for political activities.

    - Be coerced into political involvement.

2. Employees are free to participate in political activities outside of work hours.

7.14 Residence Requirement

City employees are not required to live within Willard city limits but are encouraged to do so. This suggestion is intended to foster a greater interest in and concern for the welfare of the community on the part of the city's employees.

7.15 Disciplinary Policy (Additional documents needed)

7.15.1 Purpose

The purpose of this policy is to establish a consistent, fair, and transparent disciplinary process for employees of the City of Willard. This policy is designed to:

- Promote accountability and adherence to workplace standards.
- Provide employees with clear expectations for behavior and performance.
- Offer opportunities for corrective action and improvement before more severe disciplinary measures are imposed.
- Ensure that all disciplinary actions are administered fairly and consistently across all departments.

7.15.2 Scope

This policy applies to all employees of the City of Willard, whether employed on a full-time, part-time or seasonal basis.

Nothing in this policy shall be construed to modify or alter the at-will employment status of any City of Willard employee, nor shall it create any contractual rights or guarantees of continued employment.

7.15.3 Guiding Principles

1. **Progressive Discipline** – The City believes in progressive discipline and requires all supervisors to utilize progressive discipline whenever possible. Unfortunately, some situations do not lend themselves to progressive discipline. Consequently, the City cannot and does not guarantee that progressive discipline will be used in all cases and reserves the right to discipline and discharge all employees at any time without advance notice. Furthermore, progressive discipline is less likely to be used for employees who have been employed with the City for less than 6 months.
2. **Consistency & Fairness** – Disciplinary actions will be applied uniformly and fairly across all departments.
3. **Documentation** – All disciplinary actions must be properly documented and retained in the employee's personnel file.

4. **Right to Respond** – Employees have the right to provide their perspective on any disciplinary action taken against them.

7.15.4 Types of Violations

Violations of City policies, procedures, and expectations fall into two broad categories:

1. **Performance-Related Issues**
    - Poor job performance
    - Failure to meet deadlines or assigned tasks
    - Excessive absenteeism or tardiness
    - Failure to follow reasonable job-related instructions or workplace procedures
2. **Conduct-Related Violations**
    - Violations of City policies, including ethics and workplace behavior standards
    - Disrespectful or inappropriate behavior toward supervisors, coworkers, or the public
    - Misuse or unauthorized use of City property, funds, or resources
    - Workplace harassment, discrimination, or bullying
    - Substance abuse in the workplace
    - Criminal activity or misconduct on or off duty that impacts the City's reputation
    - Acts of violence, threats, or workplace safety violations

These lists are not intended to be exhaustive and serve as examples of types of violations and where they may be categorized. The omission of a type of violation shall not be construed to mean that such a violation, when encountered, should not be addressed.

7.15.5 Disciplinary Process

Step 1: Verbal Warning (Informal Correction)

- A supervisor provides an initial verbal warning when an issue is identified.
- The supervisor clearly explains the problem, expected improvements, and potential consequences if the behavior or performance does not improve.
- While informal, the verbal warning should be documented internally.

Merit Raise Eligibility:

- Employees receiving a verbal warning (**Step 1**) *may* still be eligible for a merit increase, provided:
  - They correct the issue and do not receive a second correction for the same issue more than once during a rating period.
  - They do not receive multiple informal counseling sessions for separate issues within a rating period.
  - If multiple unrelated issues occur within the same rating period, or across rating periods, the **HUMAN RESOURCES Department, with approval from the City Administrator**, may determine that the employee is ineligible for a merit raise as part of the disciplinary action.

Step 2: Written Warning (Formal Notice)

- If the issue continues or is more serious, the supervisor issues a written warning that:
  - Clearly describes the violation.
  - Outlines the expected corrective actions and timeline for improvement.
  - Informs the employee of potential future disciplinary actions if the issue persists.
- The written warning is signed by the employee, supervisor, and HUMAN RESOURCES, then placed in the personnel file.

Merit Raise Eligibility:

- Employees receiving a written warning (**Step 2**) will not be eligible for a merit raise for the performance rating period in which the warning was issued. Example, an employee whose 12 month rating period begins January 1 and ends December 31 who received a written warning in August shall not be eligible for a merit raise when their performance is evaluated.

Step 3: Performance Improvement Plan (PIP) or Suspension

- If an employee receives a rating of 1-1.99 **(Unsatisfactory)** rating on an evaluation or fails to correct behavior after a written warning, they may be placed on a Performance Improvement Plan **(PIP)** for 90 days, with:
  - Clearly defined goals and measurable expectations.
  - Regular check-ins with their supervisor.
- For serious policy violations, an employee may be placed on **suspension** (with or without pay) while an investigation is conducted.

- The HUMAN RESOURCES Department and City Administrator must approve any suspension.
- The extension of a PIP may be permitted upon approval by the HUMAN RESOURCES Department, City Administrator or Designee if it appears an employee is making progress towards satisfactorily completing the plan. Including approved extensions, no PIP may exceed 180 days.

Merit Raise Eligibility:

- Employees receiving a PIP or suspension (**Step 3**) will not be eligible for a merit raise in the performance cycle in which the disciplinary action was issued. Example, an employee whose 12 month rating period begins January 1 and ends December 31 who received a written warning in August shall not be eligible for a merit raise when their performance is evaluated.
- **Exception:** If, upon completion of an investigation, an employee is found not to have committed any serious policy violation, they may remain eligible for a merit raise, provided that any resulting disciplinary action does not exceed Step 1.

Step 4: Final Disciplinary Action (Termination or Demotion)

- If the issue is not corrected during the PIP or the violation is severe enough, the City may proceed with termination or demotion.
- **Immediate termination may occur for serious offenses**, including but not limited to:
  - Theft, fraud, or falsification of records.
  - Workplace violence or threats.
  - Severe policy violations, including harassment or discrimination.
  - Criminal activity, or other actions, that affect the employee's job performance or public trust.
- The decision to terminate must be reviewed and approved by the HUMAN RESOURCES Department and City Administrator.
- **Exception:** Department heads shall not be terminated without Mayoral approval unless immediate action is necessary to prevent significant harm, such as criminal activity, ongoing violence, or other serious threats to the City's operations, safety or ability to uphold the public's trust.

7.15.6 Employee Rights & Appeals

1. **Right to Respond:** Employees may provide a written response to any disciplinary action, which will be kept in their personnel file.

2. **Appeals Process:**
   - Employees may request a review of any disciplinary action (step 2 or higher) within five (5) business days of receiving it.
   - The request must be submitted in writing to the HUMAN RESOURCES Department.
   - The City Administrator or a designee will review the appeal and make a final determination within ten (10) business days.
3. The filing of an appeal does not "stay" (pause or delay) the implementation of the disciplinary action. The discipline imposed shall take effect immediately on the date specified in the disciplinary notice and will remain in effect throughout the duration of the appeal process.
4. If an employee is suspended or terminated, they must remain away from City property and cease all City-related duties as directed, regardless of whether an appeal has been filed.
5. If the City Administrator or their designee determines through the appeal process that the discipline should be modified or rescinded, the City will take appropriate corrective measures at that time.

7.15.7 Documentation & Recordkeeping

1. **All disciplinary actions** be documented and placed in the employee's personnel file at City Hall.
2. **Supervisors are responsible** for ensuring documentation is accurate, factual, and submitted to HUMAN RESOURCES.
3. **Disciplinary records will be retained** in accordance with the City's record retention policy.

7.15.8 Administration & Oversight

1. The HUMAN RESOURCES Department is responsible for ensuring disciplinary policies are applied consistently across all departments.
2. The City Administrator will provide oversight to ensure fair and lawful disciplinary actions.
3. Supervisors must complete annual training on administering discipline, proper documentation, and addressing performance concerns. This training shall be provided by

the HUMAN RESOURCES Department. Supervisors who have not completed the required training shall not administer disciplinary actions at Step 2 or above.

4. The policy shall be reviewed annually to ensure compliance with best practices and labor regulations.

7.16 Use of Artificial Intelligence (AI)

A. Purpose and Scope The City of Willard encourages the responsible use of Artificial Intelligence (AI) to improve efficiency and service delivery. This policy applies to all employees using generative AI tools (such as chatbots, image generators, or data analysis tools) for City business.

B. Protection of Confidential and Closed Records To protect the privacy of our citizens and the integrity of City operations, no employee shall input, upload, or share any information into an AI tool that is considered a closed or confidential record pursuant to Section 610.021, RSMo, or any other local, state, or federal law. This includes, but is not limited to:

- Personnel records or personal identifying information (PII).
- Records related to legal actions, causes of action, or attorney-client privileged communications.
- Sensitive law enforcement or investigative records.
- Secure infrastructure or software vulnerability information.

C. Employee Responsibility and Accuracy AI tools are known to produce "hallucinations" or factually incorrect information. It is the sole responsibility of the employee to verify the accuracy, legality, and bias of any AI-generated output.

D. Compliance Unauthorized disclosure of confidential information via AI tools or the distribution of unverified, incorrect information may result in disciplinary action, up to and including termination.

7.17 Smoke-Free and Tobacco-Free Workplace

To ensure a healthy and productive work environment for all employees and visitors, the City of Willard maintains a smoke-free and tobacco-free workplace.

Prohibitions The use of tobacco products and electronic cigarettes is strictly prohibited in the following locations:

- All City-owned or leased buildings, offices, facilities, and common areas.
- All City-owned or leased vehicles, including heavy equipment and transit vehicles.

- Within 20 feet of any entrance, exit, or ventilation intake to a City-owned building.

Definitions

- **Tobacco Products:** Includes, but is not limited to, cigarettes, cigars, pipes, and smokeless tobacco (dipping, chewing, or snuff).

- **Electronic Cigarettes:** Includes all electronic nicotine delivery systems (ENDS), such as vapes, mods, and e-hookahs, regardless of whether they contain nicotine.

Compliance: This policy applies to all employees, contractors, and visitors. Employees who violate this policy may be subject to disciplinary action, up to and including termination.

7.18 Lactation/Breastfeeding Policy

Purpose and Scope

This policy establishes guidelines for lactation accommodations in the workplace in compliance with the Fair Labor Standards Act (FLSA) and applicable state laws. The City is committed to supporting employees who are nursing mothers by providing reasonable break time and appropriate facilities for the expression of breast milk.

This policy applies to all employees who are nursing mothers and require lactation accommodations during working hours.

7.18.1 Lactation Break Time

1. The City will provide reasonable break time for an employee to express breast milk for her nursing child for up to one year after the child's birth.
2. The frequency and duration of lactation breaks may vary depending on the individual needs of the employee. Employees are encouraged to discuss their specific needs with their supervisor or the HUMAN RESOURCES Coordinator.
3. Break time for expressing milk will be provided each time the employee has a need to express milk.
4. To the extent possible, employees should use their regularly scheduled meal and rest breaks for expressing milk. If additional time is needed beyond the employee's regular breaks reasonable effort shall be made to provide time. If the employee is completely free of work during the break, the additional time will be unpaid for non-exempt employees.
5. Employees should work with their supervisors to establish mutually agreeable break schedules that minimize disruption to the employee's work and the operations of the City.

7.18.2 Lactation Location

1. The City will provide a private location, <u>other than a bathroom</u>, that is <u>shielded</u> from view and <u>free from intrusion</u> from coworkers and the public, for employees to express breast milk.
2. The designated lactation location(s) will be designated upon request, and reasonable effort will be made to designate an area within that employees work area when possible.
3. The lactation location will:

- Be clean and sanitary
- Include a place to sit
- Have access to electricity
- Be in close proximity to the employee's work area when possible
- Include a surface on which to place a breast pump and other personal items
- Have access for storage of expressed breast milk.

4. If a dedicated lactation room is not available, the City will make reasonable efforts to identify and provide a temporary private space that meets the requirements above. This space does not have to be dedicated but will be available immediately as needed and will be free from view and free from intrusion.

7.18.3 Requesting Lactation Accommodations

1. Employees who anticipate the need for lactation accommodations should notify their supervisor or the HUMAN RESOURCES Coordinator as far in advance as possible, preferably before returning from parental leave, to allow the City sufficient time to make necessary arrangements.
2. Employees should submit their request for lactation accommodations in writing to the HUMAN RESOURCES Coordinator, including:
   - The anticipated duration of the need for lactation accommodations
   - The estimated frequency and duration of breaks needed
   - Any specific accommodations requested
3. The City will make reasonable efforts to accommodate the employee's needs while balancing the operational needs of the city.
4. If an employee believes that their lactation accommodation needs are not being adequately addressed, they should contact the HUMAN RESOURCES Coordinator immediately.

7.18.4 Non-Discrimination and Non-Retaliation

1. The City prohibits discrimination or retaliation against an employee for exercising their rights under this policy or applicable laws regarding lactation accommodations.
2. The City will not tolerate any form of harassment, ridicule, or negative comments directed at employees who are expressing milk or utilizing lactation accommodations.
3. Employees who believe they have been subjected to discrimination, retaliation, or harassment related to lactation accommodations should report such conduct immediately to the HUMAN RESOURCES Coordinator or through the City’s established complaint procedure (Refer to section 7.9.3).
4. All complaints will be promptly investigated, and appropriate corrective action will be taken if any violation of this policy is found.

7.18.5 Storage of Expressed Milk

1. Employees are responsible for the proper storage of their expressed milk.
2. If refrigeration is not available, employees may provide their own cooler or storage container for expressed milk.
3. All expressed milk stored in the workplace must be clearly labeled with the employee's name and date of expression.
4. The City is not responsible for the security or integrity of expressed milk stored in City’s refrigerators or on City’s premises.

7.18.6 Supervisor Responsibilities

1. Supervisors are responsible for:
   - Responding promptly and supportively to requests for lactation accommodations
   - Ensuring that employees are not penalized for utilizing lactation breaks

  - Maintaining the privacy and dignity of employees utilizing lactation accommodations
  - Addressing any concerns or complaints related to lactation accommodations promptly
2. Supervisors should contact the HUMAN RESOURCES Coordinator for guidance if they have questions about implementing this policy or addressing specific accommodation requests.

7.18.7 Employee Responsibilities

1. Employees utilizing lactation accommodations are responsible for:
   - Providing advance notice of the need for lactation accommodations when possible
   - Maintaining the cleanliness of the lactation room after each use
   - Storing expressed milk properly and in labeled containers
   - Adhering to agreed-upon break schedules to the extent possible
   - Communicating any changes in lactation accommodation needs to their supervisor or the HUMAN RESOURCES Coordinator.

7.19 Workplace Violence Prevention

7.19.1 Zero-Tolerance Policy

- The City of Willard is committed to providing a safe, violence-free workplace for all employees, contractors, and visiting members of the public. The City maintains a zero-tolerance policy regarding workplace violence. Any employee who engages in threats, intimidation, or physical violence will be subject to immediate disciplinary action, up to and including termination of employment and potential legal prosecution.

7.19.2 Prohibited behavior includes, but is not limited to:

- Physical Assault: Hitting, pushing, tripping, or any intentional physical contact intended to cause harm or intimidation.

- Verbal or Written Threats: Any statement (expressed or implied) of an intent to cause physical harm to people or damage to City property.

- Intimidation and Bullying: Stalking, aggressive shouting, or "looming" over others in a way that creates a reasonable fear of injury.

- Property Damage: Intentional destruction or defacing of City property or the personal property of another employee.

- Weapon Possession: Bringing unauthorized weapons of any kind onto City premises, into City vehicles, or to any City-sponsored event, except as specifically authorized or by sworn law enforcement officers.

7.19.3 Reporting Procedures

Safety is everyone's responsibility. If you witness or are a victim of workplace violence:

- If there is an immediate threat to life or safety, call 911 or contact the Willard Police Department immediately.
- Report all incidents, even those that seem "minor," to your Department Head or the City Administrator.
- The City strictly prohibits retaliation against any employee who, in good faith, reports a violation of this policy. Reports will be handled with as much confidentiality as the investigation allows.

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8. SUBSTANCE ABUSE POLICY

8.1 Purpose

The City of Willard is committed to maintaining a safe, productive, and drug-free workplace for all employees while ensuring compliance with federal and state regulations. This policy is designed to:

- Protect the safety and health of employees and the public.
- Prevent accidents, injuries, and property damage caused by impairment.
- Ensure compliance with the Drug-Free Workplace Act of 1988 and the Omnibus Transportation Employee Testing Act of 1991.
- Establish guidelines for drug and alcohol testing, rehabilitation, and disciplinary actions.
- In accordance with Article XIV of the Missouri Constitution, the City will not discipline or discriminate against an employee solely for their status as a medical marijuana cardholder or for a positive drug test. This protection does not apply to on-duty use, possession, or impairment. Furthermore, employees in safety-sensitive positions (e.g., Law Enforcement, Fire, equipment operators, CDL holders, etc.) or those subject to federal mandates remain prohibited from use to ensure public safety and federal compliance.

8.2 Prohibited Conduct

The following actions are strictly prohibited:

1. **Illegal Drug Use and Alcohol Consumption**
   - No employee shall unlawfully manufacture, distribute, dispense, possess, or use controlled substances or alcohol while on duty, on City premises, or while operating City vehicles or equipment.
   - Employees must not report to work or remain at work under the influence of alcohol, illegal drugs, or misused prescription drugs.
   - The unauthorized possession, sale, or use of illegal drugs at any time (whether on or off duty) is strictly prohibited.
2. **Legal and Prescription Drugs**
   - Employees who are taking prescribed or over-the-counter medications that may impair performance must notify the City Administrator before engaging in work-related activities. The City may require a fitness-for-duty certification from a healthcare provider.
   - Employees may not use another person's prescribed medication under any circumstances.

3. **Reporting Drug-Related Convictions and License Suspensions**

    - Employees must notify the City Administrator within five (5) calendar days of any drug- or alcohol-related criminal charge, conviction, plea, or loss of driving privileges if driving is an essential job function.
    - Failure to report will result in disciplinary action, up to and including termination.

8.3 Drug and Alcohol Testing Requirements

As a condition of employment, all employees are subject to mandatory drug and alcohol testing, including:

1. **Pre-Employment Testing**

    Commented [WC8]: will be expanding this

    - All applicants must pass a pre-employment drug test before beginning work.
    - A positive test result will disqualify the applicant for at least two (2) years.
    - Applicants must submit to testing within 48 hours of notification.
    - Failure to test or refusal to submit within the required timeframe results in automatic disqualification. A second refusal results in permanent disqualification from employment.

2. **Reasonable Suspicion Testing**

    - Employees may be tested if there is objective evidence of impairment (e.g., odor of alcohol, slurred speech, erratic behavior, or other observable indicators).
    - Testing must be ordered by a supervisor or department head and documented.
    - Employees subject to reasonable suspicion testing must be transported by City personnel to the testing site.
    - Testing must be conducted within two (2) hours of the observation but no later than:
        - Eight (8) hours for alcohol testing.
        - Thirty-two (32) hours for drug testing.
    - Supervisors who fail to report reasonable suspicion observations may be subject to disciplinary action.

3. **Random Testing**

    - The City may conduct unannounced, random drug and alcohol testing of employees upon the direction of the City Administrator or HUMAN RESOURCES Department.

- Selection must be truly random, ensuring all employees have an equal chance of being tested.
- Employees must report immediately for testing when selected.
- Failure to report will result in disciplinary action.

4. **Post-Accident Testing**
   - Employees involved in work-related accidents that result in injury to a person or damage to property shall be required to submit to drug and alcohol testing.
   - Testing must occur within two (2) hours following the accident.
5. **Return-to-Work & Follow-Up Testing**
   - Employees returning to work after a positive test result, rehabilitation program, or disciplinary action must undergo return-to-work testing.
   - Follow-up testing will be conducted at the City's discretion.

8.4 Disciplinary Actions for Policy Violations

Employees who fail a drug or alcohol test, refuse to test, or violate this policy will face disciplinary action, including but not limited to:

1. **First Violation**
   - Termination of employment or, at the City's discretion, a one-time rehabilitation opportunity (see Section 8.5).
   - Employees must complete rehabilitation at their own expense before returning to work.
2. **Second Violation**
   - Immediate termination of employment.
3. **Refusal to Test**
   - Refusal to submit to a required test will be considered misconduct connected to work and result in immediate termination.

8.5 Rehabilitation Assistance

Employees are encouraged to seek professional help for substance abuse issues before violating this policy. The City offers a one-time rehabilitation opportunity under the following conditions:

1. The employee must complete an assessment with a rehabilitation professional approved by the City.

2. The employee must comply with the treatment plan.
3. The employee must provide medical documentation of rehabilitation progress.
4. The employee must pass a return-to-work drug and alcohol test before resuming job duties.
5. The employee must submit to unannounced follow-up testing for a minimum of 12 months.
6. The employee must not engage in any future substance abuse violations.

Important:

- Rehabilitation is only available once per employee.
- Failure to complete the treatment plan or comply with follow-up testing will result in termination and permanent disqualification.

8.6 Confidentiality

All drug and alcohol testing records will be kept confidential and stored separately from personnel files. Test results will only be disclosed:

- To the employee.
- To supervisors or managers who need to know for safety or disciplinary reasons.
- As required by law or in legal proceedings.

8.7 Employee Responsibilities

- Follow this policy and report any known violations.
- Notify the HUMAN RESOURCES Department of any medication that may impair job performance.
- Report any suspected substance abuse in the workplace.
- Seek help voluntarily if struggling with substance abuse.

8.8 Supervisor Responsibilities

- Observe and document signs of impairment.
- Ensure employees comply with this policy.
- Report and document reasonable suspicion observations.
- Arrange for transportation of an impaired employee.
- Maintain confidentiality of test results and records.

8.9 Acknowledgment and Compliance

All employees must sign an acknowledgment stating they have received, read, and understood the City of Willard's Substance Abuse Policy.

Failure to comply with this policy will result in disciplinary action, up to and including termination and permanent disqualification from employment.

9. JOB PERFORMANCE EVALUATION – MODIFIED BY ORD 2/10/25

9.1 Performance Evaluation Policy

1. **Annual Evaluations:**
    - All employees shall receive a formal annual performance evaluation to assess their individual contributions, performance outcomes, and alignment with organizational goals.
    - The evaluation must be:
        - Completed, approved, and reviewed with the employee within 30 days of their employment anniversary date.
        - Documented and signed by both the employee and their supervisor, with an opportunity for employee comments.
        - Filed in the employee's personnel record.
    - *If an employee is on extended leave (e.g., medical leave or FMLA) near their anniversary date, the evaluation may be delayed until their return, with approval from the HUMAN RESOURCES Department.*
2. **Evaluation Framework:**
    - Performance evaluations shall consider:
        - **Core Job Responsibilities**: Proficiency in assigned duties and adherence to job descriptions.
        - **Goal Achievement**: Progress toward established departmental and organizational goals.
        - **Behavioral Competencies**: Communication, teamwork, problem-solving, and adherence to city values.
        - **Professional Development**: Efforts toward skill-building and continuous learning.
3. **Performance Rating Scale:**
    - Evaluations shall utilize the following standardized rating system:
        - **1 – Unsatisfactory**: Performance fails to meet minimum expectations; immediate action required.
        - **2 – Needs Improvement**: Performance meets some/most but not all expectations; improvement expected.
        - **3 – Satisfactory**: Performance meets expectations in all key areas.

    - **4 – Above Average**: Performance consistently and clearly exceeds expectations in most areas.
    - **5 – Role Model**: Performance significantly exceeds expectations; exemplary behavior and results with clear evidence and examples.
  - *Supervisors must document specific examples of employee achievements or performance challenges to support each rating of 4, 5, or 1.*

4. **Review of Ratings:**
   - Ratings of **4 (Above Average)** or **5 (Role Model)** shall be reviewed by the City Administrator (CA) and the Human Resources (HR) Department to ensure that similar standards are applied consistently across all staff and departments.
   - Ratings of **1 (Unsatisfactory)** shall be reviewed by the HUMAN RESOURCES Department, along with any supporting disciplinary documents or Performance Improvement Plans **(PIP)**, prior to presenting the evaluation to the employee.
   - *If a rating is downgraded during the review process, the supervisor is responsible for "owning" the revised score.* Supervisors shall not inform employees that a higher score was proposed but downgraded by HUMAN RESOURCES or the CA. It is the responsibility of Supervisors to justify their proposed ratings during the review process, any failure to provide sufficient justification will result in a partial or completed scoring downgrade.
5. **Expectations for Improvement:**
   - Employees receiving a **1 (Unsatisfactory)** rating:
     - Must be placed on a Performance Improvement Plan (PIP) detailing specific areas for improvement, clear performance metrics, and a 90-day timeline.
     - Supervisors shall provide consistent coaching and monitoring during the PIP period.
     - Failure to improve may result in disciplinary action up to and including termination.
   - Employees receiving a **2 (Needs Improvement)** rating:
     - Shall receive targeted feedback and opportunities for growth within the next annual rating period.
6. **Merit Raise Eligibility:**
   - Employees with a **2 (Needs Improvement)** or higher rating are <u>eligible</u> for consideration of a merit raise, contingent upon the availability of funds.

- Employees with a **1 (Unsatisfactory)** rating are ineligible for a merit increase until the next evaluation cycle provided performance improves to a satisfactory level or higher.

9.2 Midpoint and Ad Hoc Evaluations

1. **Midpoint Evaluation (6-Month Check-In):**
   - Midpoint evaluations are encouraged and, while informal, should focus on the same areas assessed in the official evaluation form to ensure continuity and alignment with performance standards.
   - Supervisors should document key discussion points to track progress and address areas for improvement. This documentation should be provided to HUMAN RESOURCES for retention in the employee's personnel file.
2. **Ad Hoc Evaluations:**
   - Supervisors may conduct evaluations at any time when performance issues arise or to provide additional guidance and support.
   - Ad hoc evaluations can serve as tools to document specific incidents or achievements, reinforcing accountability.
   - Documentation should be provided to HUMAN RESOURCES for retention in the employee's personnel file.

Supervisor and Employee Responsibilities

1. **Supervisor Responsibilities:**
   - Set clear expectations, goals, and measurable performance metrics at the start of the evaluation period.
   - Provide ongoing feedback, coaching, and support throughout the year.
   - Conduct fair and unbiased evaluations based on documented evidence and objective criteria.
   - Engage employees in meaningful conversations during evaluations to foster understanding and growth.
   - *Supervisors should receive annual training on conducting evaluations, setting measurable goals, and providing constructive feedback. This shall be the responsibility of the HUMAN RESOURCES Department or designee to facilitate.*
2. **Employee Responsibilities:**

- Actively seek feedback and clarification on performance expectations.
- Commit to professional development and skill enhancement.
- Address any performance concerns or improvement areas identified by their supervisor.

9.3 Merit Raise Determination and Payment Timeline:

1. **Eligibility and Timing:**
   - Merit raises are contingent upon satisfactory performance (rating of **2 or higher**) and the availability of funds.
   - Raises, if awarded, shall be effective will be effective beginning in the first full payroll period following the annual performance evaluation.
2. **Annual Timeline for Evaluations and Raises:**
   - **Midpoint Evaluation**: Conducted 6 months after the employee's annual employment anniversary to provide structured feedback.
   - **Annual Evaluation**: Conducted within 30 days of the employee's anniversary date, determining merit eligibility.
   - **Merit Raise**: If approved, will be effective beginning in the first full payroll period following the evaluation date.

9.4 Administration:

This policy shall be administered by department heads and overseen by the City Administrator (CA) and Human Resources (HR) Department to ensure consistency, transparency, and alignment with city values.

1. **Notification of Evaluation Due Dates:**
   - The HUMAN RESOURCES Department will notify department heads of upcoming evaluation due dates 30 days before the anniversary date of each employee.
   - Department heads are responsible for:
     - Notifying subordinate supervisors of evaluations due within their teams.
     - Ensuring that all evaluations are completed and submitted on time.
2. **Submission Timeline:**

- Completed evaluations must be submitted to the HUMAN RESOURCES Department no later than **7** days after review with the employee, and no later than 30 days after the anniversary date to allow adequate time for review and approval by the HUMAN RESOURCES and/or CA as appropriate to the rating.

3. **Oversight of Ratings:**
   - Ratings of **4 (Above Average)** or **5 (Role Model)** will be reviewed by the HUMAN RESOURCES Department and CA to ensure consistent standards are applied across all departments.
   - Ratings of **1 (Unsatisfactory)** will be reviewed by the HUMAN RESOURCES Department, along with any supporting disciplinary documentation or Performance Improvement Plans (PIPs), before presenting the evaluation to the employee.

   Responsibility for Downgraded Ratings:

   - If a rating is downgraded during the review process, it is the responsibility of the supervisor to "own" the revised score.
   - Supervisors shall not inform employees that a higher score was proposed but downgraded by the HUMAN RESOURCES Director or CA.
   - It is the supervisor's responsibility to justify higher ratings during the review process. Failure to justify a higher proposed rating is the responsibility of the supervisor and shall not be attributed to others.

10. UNIFORMS – MODIFIED BY ORD 2/10/25

10.1 Police Department

Each officer of the Willard Police Department will receive a $1,000.00 uniform allowance for the first year of employment. Each additional year they shall receive a $650.00 uniform allowance issued once each year in January after showing proof of purchase. This allowance is to be used for dress uniforms and equipment required by the Department policy. A receipt will be required for all uniform purchases for the employee to be reimbursed.

Uniforms may be purchased at approved vendors under the City's name to be repaid by payroll deduction after the maximum allowance has been reached. Any deduction will be by the following schedule:

- $100.00 or less will be deducted in one (1) pay period.
- $101.00 to $200.00 will be deducted a minimum of $50.00 per pay period at a maximum of four (4) pay period deductions.
- $201.00 or more will be deducted at a minimum of $50.00 per pay period at a maximum of eight (8) pay periods.
- Maximum purchase through the City of Willard over and above the uniform allowance is $500.00.

10.2 Public Works and Parks Maintenance Departments

Uniform Allowance – Revised Reimbursement and Purchasing Policy

Effective [4/27/2026], the uniform and boot allowance program for the Public Works and Parks Maintenance Departments will transition from a flat stipend model to a tracked reimbursement and city-purchasing model, aligning more closely with the accountability structure used in the Police Department.

Annual Allowance and Budget Control

- Each full-time employee in the Public Works or Parks Maintenance Department will be allocated an annual uniform allowance of **up to $500**, the Chief Financial Officer is authorized to adjust the actual amount based on available budget, employee classification, and operational needs provided it does not exceed $500 overall per employee.
- This allowance is for eligible work-related clothing and equipment such as safety boots, work jeans, cold-weather gear, safety yellow attire, and other job-appropriate items. Items should be approved by the department head before purchasing anything, failure to obtain approval may result in a reimbursement being declined by financial department.
- For administrative employees within these departments whose work duties do not require field apparel, department heads may instead provide a limited supply of City-branded apparel (e.g., polos or hoodies) without issuing the full allowance.

Purchase Options
Employees may utilize their uniform allowance by:

1. **Purchasing Through the City:**
    - Preapproved items may be ordered by the department using city accounts (e.g., vendor accounts or city credit card) and shall be applied to the employee's annual balance.
    - If a purchase causes the employee to exceed their annual balance, the overage shall be deducted from the employee's paycheck as specified above; if it is known in advance the purchase shall not be completed before obtaining the employee's written consent to deduct.
    - The department will maintain individual records of purchases and balances of their employees and will provide those records regularly to the financial department.
2. **Submitting for Reimbursement:**
    - Employees may purchase eligible items and submit itemized receipts to the department head for reimbursement, up to the remaining balance of their annual allowance.
    - Reimbursements above the available balance will be capped at the remaining amount and the employee shall be responsible for the overage, including any taxes that may be due on the additional amount.

Tracking and Administration

- Allowances will be tracked by the department for each calendar year.
- Departments will split total uniform budget allocations across relevant divisions (e.g., Streets, Water, Sewer) as guided by the Finance Department.
- Department heads or their designees will maintain up-to-date logs of individual balances and purchase history by fiscal year; unspent allowances shall not carry over into future fiscal years.
- Department heads may carry a small contingency for department-wide purchases (e.g., seasonal gear, replacement items) as budget permits.

Remaining Funds and Budget Management

- Departments are encouraged to manage the uniform allowance budget to ensure equitable access for new hires and planned equipment needs (e.g., required hoodie purchases or washer/dryer procurement).
- Budget lines may be adjusted annually during the budget development process to reflect operational realities, staffing levels, and historical spending patterns.

The employee is expected to report to work in clean, well mended attire that is appropriate for the work to be accomplished. If, in the opinion of the Supervisor, Department Head or City Administrator, the employee fails to comply with this expectation, appropriate disciplinary action may be taken.

Uniform Issuance Provision

1. **Annual Issuance:**
    - The City will provide per employee:
        - **3 City-branded T-shirts**
        - **2 City-branded hooded sweatshirts**
    - These items will be issued to employees as needed to ensure each employee has a personal supply as indicated above. If not immediately required, uniforms will be retained in storage until a reasonable shelf supply is available.
2. **Sizing:**
    - Employees are expected to provide their supervisor with accurate and current size information to ensure proper fit, comfort and safety.

Employee Responsibilities

1. **Presentation:**
    - Employees must ensure their uniforms are tidy and well-maintained to present a professional appearance on the job.
    - Clothing shall not be modified under any circumstances; e.g. removing sleeves, cutting holes, adding unapproved badges or logos etc.
2. **Laundry:**
    - A washer and dryer has been provided at the Public Works building to support uniform care. Employees are encouraged to use this equipment to maintain their uniforms in good condition.
    - **Personal laundry is prohibited.**
3. **Jeans:**
    - Employees are responsible for providing their own work-appropriate jeans.
    - The annual uniform allowance may be used to assist with this expense as noted above in this policy section.
    - Employees may use City equipment to clean their work jeans.

Damaged Uniforms

1. **Replacement of Damaged Shirts:**
    - Employees may turn in damaged City-branded shirts to their supervisor for replacement.

- If shirts are routinely damaged due to negligence, the employee may be required to pay for replacements.

Return of City Property

1. **End of Employment:**
   - Upon termination of employment, all City-branded uniforms must be returned.
   - Failure to return City property will result in the cost of replacements being withheld from the employee's final paycheck up to the limits permitted by law.

Acknowledgment

Employees must sign an acknowledgement to indicate their understanding and agreement to the terms of this policy

11. SEVERE WEATHER CONDITIONS

In the event of severe weather or hazardous conditions, the City Administrator may authorize the full or partial closure of City Hall and other administrative operations. This policy applies to all non-essential employees assigned to City Hall and other administrative departments. Public safety and essential service personnel are expected to report to work unless otherwise directed by their department head.

11.1 Closure Authorization and Communication

- The City Administrator will determine whether conditions warrant a closure or delayed opening based on available information, including road conditions and forecasts.
- The Public Works Director shall provide timely updates on local road conditions and snow removal progress, in accordance with the City's road response plan, to assist the City Administrator in decision-making.
- Closure decisions will be communicated by the City Administrator via text message to department heads as soon as reasonably possible. In cases of uncertain or rapidly changing conditions, the decision may be made with limited notice.
- Department heads are responsible for promptly notifying their employees using a communication method appropriate to their department.

11.2 Employee Responsibilities and Pay

- When City Hall is closed due to weather, affected employees will receive regular pay for their scheduled work hours without needing to use leave.
- If an employee was previously scheduled to use leave (e.g., vacation, personal, birthday, comp time), that leave will still be charged as originally submitted and approved. For example:
    - An employee scheduled for 8 hours of personal leave will still be charged 8 hours.
    - An employee scheduled to use 2 hours of comp time will still be charged for those 2 hours.
- In cases of partial-day closures (e.g., early dismissal or delayed opening), the same rules apply regarding pay and leave usage.

11.3 Remote Work Requirements

- If the nature of an employee's work allows remote access (e.g., finance, HUMAN RESOURCES, administrative functions), the employee is expected to work remotely during any closure to ensure continuity of operations.
- When closures are anticipated, employees with remote-capable duties must take their assigned laptop and any necessary work materials home in advance of the anticipated closure.

11.4 Non-Closure Hazardous Conditions

- If City Hall is open, but an employee determines that travel to/from work is/is likely to become unsafe due to conditions in their specific area, the employee must notify their supervisor as soon as possible.
- Employees who choose not to report to work/leave early under these circumstances will be required to use an appropriate type of available leave (e.g., personal, vacation, birthday, or comp time) to cover their absence.
- If a closure is later determined, their earlier decision to use personal leave will remain unchanged.

12. MEETINGS, CONFERENCES, AND REIMBURSEMENT POLICY

12.1 Purpose

The City of Willard supports the professional development of full-time employees by authorizing their participation in relevant meetings, trainings, and conferences that enhance job performance and support the City's mission. This policy also outlines guidelines for reimbursement of related expenses.

12.2 Applicability

This policy applies to full-time employees only. Part-time and seasonal employees may not attend reimbursable activities unless approved in advance by the City Administrator. All attendance and reimbursement are subject to budget availability and administrative discretion.

12.3 Attendance and Approval

Employees may attend events directly related to their current or anticipated job duties, including but not limited to conferences, training programs, seminars, and association meetings. Events with anticipated costs exceeding $1,000 should ideally be planned for during the annual budget process.

- Any proposed participation not already budgeted must be submitted to the employee's Department Head for review and, if supported, presented to the City Administrator for approval.
- Time spent at approved events will be considered regular work time and not charged to leave.
- The City Administrator may also grant time off with pay to attend educational opportunities, even if expenses are not reimbursed.

12.4 Reimbursement Guidelines

A. Eligible Reimbursable Expenses

Approved expenses may include:

- Lodging
- Mileage (if using a personal vehicle)
- Conference registration
- Meals (see below)
- Parking fees and tolls
- Business-related calls or communications

B. Meals

- Reimbursement for meals will follow established per diem rates.
- Alcohol is not reimbursable under any circumstances.

- Itemized receipts are required for all meal reimbursements; missing or non-itemized receipts will result in denial of reimbursement for that item.

C. Transportation and Mileage

- Employees must make a reasonable attempt to use an appropriate City vehicle for travel.
  - City Hall employees should not use Police Department or Public Works vehicles unless specifically authorized.
  - If a City vehicle is unavailable or unsuitable, mileage reimbursement for a personal vehicle may be approved.
- If a City vehicle is available but the employee chooses to use a personal vehicle without appropriate justification, mileage reimbursement shall be denied.
- Reimbursement for personal vehicle use will be calculated at the Missouri state-approved mileage rate using the shortest route from the employee's duty station or residence (whichever is shorter).
- Personal vehicle use must be documented with the date, destination, purpose, and total miles.

D. Optional Add-Ons and Upgrades

Optional upgrades (e.g., first-class airfare, premium lodging, add-on events or excursions) will not be reimbursed. Any upgrades must be clearly identified on the reimbursement request.

E. Non-Reimbursable Expenses

The following are examples of non-reimbursable costs (this should not be considered an exhaustive list):

- Alcohol
- Entertainment or sightseeing expenses
- Room service or minibar purchases
- Optional meals. This is defined as a meal expense incurred instead of eating a meal that was provided by the event/conference the employee attended.
- Snacks or travel supplies
- Unapproved guests' expenses
- Tips exceeding 15%

12.5 Submission Process

- Employees must submit all reimbursement requests within 30 days of the expense being incurred.
- Requests must include a completed reimbursement form, a description of the purpose, and all <u>itemized</u> receipts for which reimbursement is being sought.

- For attendance at a conference or multi-day event, a copy of the agenda must be provided showing the activities, dates and times.
- Approved reimbursements will be processed through accounts payable within two pay cycles and will appear on the employee's paycheck.
- The City does <u>not</u> issue travel advances of any kind.

12.6 Oversight and Accountability

- The City Administrator, or designee, will determine eligibility and approval.
- Department Heads are responsible for ensuring compliance within their departments.
- The submission of false or misleading reimbursement requests may result in disciplinary action up to and including termination in addition to any allowable remedies that may exist under law.

13. WHISTLEBLOWER PROTECTION POLICY

13.1 Purpose

The City of Willard is committed to the highest standards of ethical, moral, and legal conduct. In line with this commitment, this policy is intended to encourage employees, volunteers, and contractors to report any suspected violations of law, city policy, or unethical conduct without fear of retaliation.

13.2 Scope of Policy

This policy applies to all City of Willard employees, including full-time, part-time, seasonal, and temporary staff, as well as volunteers and independent contractors.

13.3 Definition of Whistleblowing

A "whistleblower" is an individual who reports an activity that they consider to be illegal, dishonest, or a violation of City policy. Examples of "protected disclosures" include, but are not limited to:

- Violations of federal, state, or local laws or regulations.
- Gross mismanagement or waste of public funds.
- Abuse of official authority.
- Actions that pose a substantial and specific danger to public health or safety.
- Fraud, embezzlement, or theft of City property.

13.4 Reporting Procedure

Employees are encouraged to share their questions, concerns, or complaints with someone who can address them properly.

Initial Report: In most cases, an employee's supervisor is the best person to address an area of concern.

Escalation: If the employee is not comfortable speaking with their supervisor, or the supervisor is the subject of the concern, the employee should report the matter directly to the HUMAN RESOURCES Department, the City Administrator, or the City Attorney.

Written Form: While reports may be made orally, employees are encouraged to provide a written statement detailing the specific facts, dates, and individuals involved to ensure a thorough investigation.

13.5 No Retaliation

The City of Willard strictly prohibits retaliation against any individual who, in good faith, reports a violation or participates in an investigation.

No employee shall be adversely affected in their employment (e.g., termination, demotion, suspension, harassment, or reduction in pay) because they made a protected disclosure.

Any employee who retaliates against a whistleblower is subject to disciplinary action, up to and including termination of employment.

13.6 Confidentiality

The City will treat all reports as confidential to the maximum extent possible, consistent with the need to conduct an adequate investigation and comply with the Missouri Sunshine Law. The identity of the whistleblower will be kept confidential unless disclosure is required by law or is essential for the investigation.

13.7 Good Faith Requirement

Anyone filing a complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation.

Any allegations that prove to have been made maliciously or with the knowledge that they were false will be viewed as a serious disciplinary offense and may result in termination.

13.8 Investigation and Resolution

All reports will be promptly investigated by the appropriate department (e.g., HUMAN RESOURCES, Legal, or an independent third party).

The investigator will notify the sender and acknowledge receipt of the reported violation or suspected violation within [five] business days.

Appropriate corrective action will be taken if the investigation confirms that a violation has occurred.

The whistleblower will be advised that the investigation has been completed, though specific details regarding personnel actions may remain confidential.

14. SEPARATION AND RETURN OF PROPERTY

Every officer and employee of the City, upon the termination of their employment or appointment for any reason, shall promptly return all City property in their possession or control. Employees are responsible for safeguarding all City of Willard equipment, materials, and work products issued to them or otherwise entrusted to their care. This includes, but is not limited to:

- Credit cards
- Identification badges
- Office/building keys and security passes
- Uniforms and protective gear (see Section 5.12)
- City-issued vehicles, tools, or equipment
- Computers, phones, removable storage devices
- Electronic access credentials (e.g., voicemail, email, software)
- City-owned records, documents, or intellectual property

14.1 Offboarding Checklist

Upon notice of separation, Department Heads shall coordinate with HUMAN RESOURCES to initiate a standardized offboarding checklist, which must be completed prior to the employee's final day. This checklist includes:

- Collection of all physical items
- Review of outstanding reimbursements, debts, or costs
- Reconciliation of final time records
- Verification of benefit continuation options
- Confirmation of return of all uniforms and related items as outlined in Section 5.12

14.2 IT Notification Requirements

Department Heads and/or HUMAN RESOURCES must notify the City's IT provider within one (1) business day of a confirmed separation or transfer. In the event of an involuntary or emergency separation, IT must be notified within one (1) hour of the employee's departure to ensure prompt deactivation of access to City systems and data.

IT will conduct its own checklist procedure related to:

- Removal of access to all systems, software, and networks
- Retrieval of all electronic devices
- Review of data backup or transfer needs

14.3 Enforcement

Where permitted by law, the City may withhold from an employee's final paycheck the cost of any unreturned property. The City also reserves the right to pursue additional remedies to recover or protect its property.

See Appendix B for the sample City of Willard Employee Offboarding Checklist.

15. CODE OF ETHICS

The City of Willard expects all employees to uphold the highest standards of personal integrity, professionalism, and public service. All staff are entrusted with public resources and responsibilities and are expected to conduct themselves in a manner that reflects positively on the City at all times—both on and off duty. Core values guiding City conduct include integrity and excellence in all work, openness to diverse perspectives, and respect for others. Employees are expected to avoid conflicts of interest, refrain from any use of their position for personal gain, maintain confidentiality, use City resources appropriately, and treat the public and their colleagues with courtesy, fairness, and professionalism. Employees are also responsible for reporting misconduct, avoiding retaliation, and maintaining appropriate workplace relationships.

Violations of the Code of Ethics may result in disciplinary action, up to and including termination of employment, in accordance with City policy. A complete set of ethical provisions, including rules concerning gifts, outside employment, computer use, and reporting obligations, is provided in **Appendix A: Code of Ethics** and shall be followed as a condition of employment.

16. GRIEVANCE POLICY

The City of Willard is committed to providing full-time employees with a fair and transparent process to seek resolution for employment-related concerns. This grievance policy is intended to address significant issues in a constructive and timely manner, while ensuring that concerns are raised through appropriate channels.

16.1 Scope and Eligible Issues

This policy applies to full-time employees only, contracted, part-time, seasonal or other non-employee or less than full time status employees are not eligible to request grievances or appeals as denoted by this policy. A grievance may be filed only in response to the following employment actions:

- Disciplinary actions at the level of written warning or higher (including suspension, demotion, or termination)
- Unsatisfactory performance evaluations (i.e., an overall rating of 1, not an unsatisfactory rating in a duty area)
- Job reassignments not related to disciplinary action

Other workplace concerns may be addressed through informal discussions with supervisors or Human Resources but do not qualify for review under this formal grievance procedure.

16.2 Informal Resolution Requirement

Prior to submitting a formal grievance, employees are expected to make a reasonable, good-faith effort to resolve their concerns informally. This includes consultation with Human Resources and/or their Department Head. If informal efforts do not result in resolution, or if the situation reasonably precludes such steps, the employee may proceed with the formal grievance process.

16.3 Filing a Grievance

To initiate a grievance, the employee must submit a written grievance to the City Administrator. The grievance must:

- Clearly state the action being grieved
- Specify the date(s) of the event or decision
- Identify the desired resolution or outcome
- Be submitted within 14 calendar days of the action giving rise to the grievance, unless the City Administrator determines there are extenuating circumstances justifying a later submission.

Grievances that do not meet these conditions may be dismissed or referred back for informal resolution. **If an employee fails to make a reasonable effort to resolve the issue informally before filing and waits to submit a grievance, additional time to meet the informal resolution expectation will not be granted.** Employees are encouraged to act promptly and in good faith to preserve the opportunity for full review.

16.4 Review and Response

The City Administrator will acknowledge receipt of the grievance and will make every effort to **respond within 30 calendar days** of receipt. This may be extended if necessary, to permit additional fact-finding, meetings with involved parties, and consultation with legal or HUMAN RESOURCES professionals as needed.

17. PERSONNEL RECORDS

Personnel records are the property of the City of Willard and are considered confidential. The Human Resources department is responsible for maintaining accurate and secure personnel files for all employees, in accordance with applicable federal and state laws. These files are maintained centrally by the City and are not to be duplicated or separately maintained by departments, except as noted below.

A personnel file shall be maintained for each employee and should include, but is not limited to, the following:

- Job application and resume
- Offer letter and position description
- Pay grade and pay band documentation
- Performance evaluations
- Disciplinary actions
- Records of promotion or salary adjustments
- Training records
- Official correspondence
- Leave-related documentation, excluding protected health information

It is the responsibility of each employee to promptly notify Human Resources in writing of any changes to personal information, such as name, address, contact number, emergency contacts, or dependent status. Department Heads may assist in collecting this information but must ensure it is promptly routed to Human Resources.

The City will retain all personnel records in accordance with applicable state and federal laws, including but not limited to retention requirements established by the Missouri Secretary of State's Office, the Missouri Sunshine Law (Chapter 610, RSMo), the Fair Labor Standards Act (FLSA), and the Americans with Disabilities Act (ADA).

17.1 Centralized Recordkeeping

All official personnel records must be maintained by the Human Resources Department. Department Heads and supervisors are not permitted to maintain their own personnel files or shadow files. The City's official personnel file, housed within HUMAN RESOURCES, is the sole repository for employment records. This practice ensures legal compliance, proper retention, confidentiality, and consistent documentation.

The only exception to this policy is for **working documents** maintained temporarily by supervisors during a performance evaluation period (e.g., notes regarding employee performance, examples of work, or informal documentation used in preparing a formal evaluation). These documents are not considered part of the official personnel file and must be handled as follows:

- At the conclusion of the performance review period, any such materials should either be securely destroyed or submitted to HUMAN RESOURCES as supplemental documentation to the official evaluation, if appropriate.
- Under no circumstances should these materials be used to maintain unofficial disciplinary records or files outside the HUMAN RESOURCES structure.

Supervisors are responsible for notifying HUMAN RESOURCES of any documents, positive or negative, that should be reviewed for potential inclusion in the official personnel record.

17.2 Maintenance of Separate and Restricted Files

Certain sensitive materials must be maintained in separate, restricted-access files. These include:

- **Medical Records:** All medical records, including doctor's notes, FMLA certifications, ADA documentation, and workers' compensation materials, must be maintained in a confidential file separate from the general personnel file in accordance with the Americans with Disabilities Act (ADA) and the Health Insurance Portability and Accountability Act (HIPAA).
- **Background Checks and Drug Test Results:** These documents must also be maintained separately from the main personnel file, accessible only to individuals authorized by law or policy.

The Human Resources Department is responsible for ensuring that these separate files are securely maintained and access is limited only to those with a legal or operational need.

17.3 Access to Personnel Records

Internal access to personnel records is limited to the Mayor, City Administrator, Human Resources, and other designated officials with a legitimate business need. Supervisors may request to review an employee's file when making employment decisions (e.g., evaluations, promotions, disciplinary action), but such access must be coordinated through Human Resources.

Employees may request to review their own personnel file by submitting a written request to Human Resources. Such review will be conducted in the presence of HUMAN RESOURCES, and copies may be provided upon request in accordance with applicable laws.

17.4 Release of Information to External Parties

Personnel and employment records will not be released to external parties except as required by law (e.g., court order, subpoena) or with written authorization from the employee.

All inquiries from third parties regarding current or former employees (e.g., reference checks, employment verifications) must be directed to Human Resources. Unless authorized by the employee in writing, the City will confirm ***only*** the dates of employment and positions held.

If a current or former employee requests a reference or release of additional employment-related information, they must submit a written request and signed release to Human Resources. The City may provide additional information in writing, at its discretion, after obtaining the proper release and ensuring no legal liability exists.

Any employee found to have released confidential personnel information without proper authorization may be subject to disciplinary action, up to and including termination.

17.5 Subpoenas and Sunshine Law Requests

In the event of a subpoena or formal request for personnel records under the Missouri Sunshine Law (Chapter 610, RSMo), the City will respond in accordance with applicable legal requirements. The Human Resources Department is responsible for coordinating the review and response process in consultation with the City Administrator and legal counsel, as appropriate.

Records that contain personally identifiable information such as Social Security numbers, personal contact information, or medical records must be redacted or withheld from disclosure unless required by court order. Employees will be notified when their records are released, unless doing so would violate the law or compromise a legal process.

All such requests and responses shall be documented and securely retained by the Human Resources Department.

18. AMERICAN WITH DISABILITIES ACT

The City of Willard complies with the Americans with Disabilities Act (ADA), as amended by the ADA Amendments Act (ADAAA), and all applicable state and local fair employment practices laws and is committed to providing equal employment opportunities to qualified individuals with disabilities. Consistent with this commitment, the City will provide a reasonable accommodation to disabled applicants and employees if the reasonable accommodation would allow the individual to perform the essential functions of the job, unless doing so would create an undue hardship on the City.

18.1 Requesting a Reasonable Accommodation

If you believe you need accommodation because of your disability, you are responsible for requesting a reasonable accommodation from your supervisor or the HUMAN RESOURCES Department. You may make the request orally or in writing. The City encourages employees to make their request in writing and to include relevant information, such as:

- A description of the accommodation you request.
- The reason you need accommodation.
- How the accommodation will help you perform the essential functions of your job.

After receiving your oral or written request, the City will engage in an interactive dialogue with you to determine the precise limitations of your disability and explore potential reasonable accommodations that could overcome those limitations. The City encourages you to suggest specific reasonable accommodations that you believe would allow you to perform your job. However, the City is not required to make the specific accommodation requested by you and may provide alternative effective accommodation, to the extent any reasonable accommodation can be made without imposing an undue hardship on the City.

18.2 Medical Information

The City may ask you to provide supporting documents from your health care provider(s) regarding the nature of your disability and the nature of your limitations, or take other steps necessary to help us determine viable options for reasonable accommodation. We will then work with you to determine whether your disability can be reasonably accommodated, and if it can be accommodated, we will explore alternatives with you and endeavor to implement a mutually agreeable accommodation.

The City will keep confidential any medical information obtained in connection with your request for reasonable accommodation and pursuant to 17.2 any such records shall be separately maintained in the personnel record.

18.3 Determinations

The City makes determinations about reasonable accommodations on a case-by-case basis considering various factors and based on an individualized assessment in each situation. The City strives to make determinations on reasonable accommodation requests expeditiously and will inform the individual once a determination has been made. If you have any questions about a reasonable accommodation request you made, please contact your supervisor or the HUMAN RESOURCES Department.

18.4 No Retaliation

Individuals will not be retaliated against for requesting accommodation in good faith. The City expressly prohibits any form of discipline, reprisal, intimidation, or retaliation against any individual for requesting an accommodation in good faith.

The City is committed to enforcing this policy and prohibiting retaliation against employees and applicants who request accommodation in good faith. If employees or applicants feel that they or someone else may have been subjected to conduct that violates this policy, they should report it immediately to their supervisor, the HUMAN RESOURCES Department or the City Administrator; a dated written report is strongly recommended. Please refer to 7.9.3 for additional information about making a complaint

18.5 Administration of This Policy

The HUMAN RESOURCES Department is responsible for the administration of this policy. If you have any questions regarding this policy or questions about disability accommodations that are not addressed in this policy, please contact your supervisor or the HUMAN RESOURCES Department.

19. OUTSIDE EMPLOYMENT

Full-time employees of the City of Willard must obtain written approval from the City Administrator prior to engaging in any outside employment. This approval must be renewed whenever there is a material change in the nature, scope, or schedule of the outside work.

Outside employment will not be approved if it:

- Occurs during the employee's scheduled City work hours,
- Requires the use of City equipment, vehicles, resources, uniforms, or confidential information,
- Creates a real or perceived conflict of interest with the duties of the employee's City position,
- Reflects poorly on the integrity, professionalism, or reputation of the City,
- Results in excessive fatigue or otherwise impairs the employee's ability to perform their City duties effectively and safely.
- Other concerns arise in the nature, duration, applicability or the additional employment being sought.

Employees are prohibited from receiving compensation, honoraria, or material gain from individuals or organizations for work performed as part of their official City duties or during City-paid time. Any personal or outside business activity must remain clearly separate from City responsibilities.

Employees found to be engaging in outside employment without required approval or in violation of this policy may be subject to disciplinary action, up to and including termination.

Please refer to Appendix E for Outside Employment Disclosure and Request Form

20: COMPUTER, TECHNOLOGY, AND SOCIAL MEDIA ACCEPTABLE USE POLICY

20.1 Purpose and Scope

This policy establishes rules for the responsible use of the City of Willard's computer systems, software, internet, email, mobile devices, and official social media platforms. It applies to all City-issued equipment and any system or platform accessed in the course of work by employees or officials.

Covered systems include but are not limited to: computers, laptops, servers, phones, tablets, software programs, voice mail, email, internet access, City social media pages, and all City-managed platforms. This policy also applies to use of personal devices and social media when used to perform City business or represent the City.

20.2 Acceptable Use of City Technology and Systems

City-owned technology and systems are provided to support official City operations. Incidental personal use is permitted during non-working hours (e.g., lunch breaks), provided such use does not interfere with City business, violate any laws or policies, or create additional cost or liability for the City.

Users must not:

- Use City systems for any illegal or unethical purpose, including fraud, harassment, defamation, or accessing obscene, hateful, or pornographic content.
- Install or use unlicensed software or unauthorized applications.
- Use City equipment for commercial gain or political activity.
- Attempt to bypass or disable security protocols.
- Download content that could introduce viruses or malware.
- Access another employee's files, email, or documents without authorization.

20.3 Passwords and Data Security

Users must protect login credentials and data. Passwords are not to be shared. If written down, they must be stored securely. IT shall be notified immediately in the event of suspected system compromise, breach, or virus infection. All data created or stored on City systems is the property of the City and may be accessed, audited, or retained in accordance with law and policy.

20.4 Monitoring and No Expectation of Privacy

Employees should have no expectation of privacy in the use of City-owned systems. The City reserves the right to monitor, retrieve, and review all communications, internet use, emails, and data created, transmitted, or received on City systems.

20.5 Department Responsibilities and High-Security Systems

Department heads are responsible for ensuring employees are informed about the use of specialized systems (e.g., law enforcement databases or federal access portals). Departments must follow any heightened standards or additional federal/state rules specific to those platforms.

20.6 Social Media Use

Social media usage, whether official or personal, must be consistent with City policy and the 2024 Social Media Ordinance. All official City pages, including those operated by departments, are subject to centralized oversight and must:

- Limit posting privileges to authorized individuals, except in emergencies where police, public works, or emergency management may post.
- Prohibit deletion of posts or blocking of users except by those expressly authorized under the ordinance.
- Represent the City in a professional and accurate manner.

Employees posting about the City or its operations using personal pages and/or profiles must clearly state that the views expressed are their own. An acceptable phrase includes:

"The views expressed here are my own and do not necessarily reflect the views of the City of Willard."

Only individuals specifically and officially authorized under City policy or regulation may post, share, or transmit official communications on behalf of the City. While employees retain their First Amendment rights to comment, express opinions, or engage in discussion, unauthorized individuals are strictly prohibited from representing, advancing, creating, sharing, or issuing any official position of, for or by the City on any platform.

20.7 Violations

Violations of this policy may result in disciplinary action up to and including termination. Serious offenses, including those that violate state or federal law, may be referred to outside authorities as may be applicable by the circumstances.

21. EMERGENCY DECLARATION

In the event of a declared emergency, exempt employees who are required to work in response to the emergency may be eligible for overtime compensation as outlined in this policy.

Purpose

The purpose of this policy is to provide a fair and consistent mechanism to compensate exempt employees who are required to work extended hours during significant emergencies or disasters, and to ensure the City is positioned to recover those costs from eligible state or federal programs where applicable.

21.1 Applicability

This policy applies when the Mayor issues a local emergency declaration, which is automatically recognized under this section. Additionally, if a declaration is made by an external authority (such as the Governor, President, or FEMA) and the City of Willard or its operations are clearly impacted by the event, the Board of Alders may, by resolution, declare concurrence with the external declaration, thereby extending the applicability of this policy to that emergency.

21.2 Eligibility

All **exempt employees** who are required to work during the declared emergency may be eligible for overtime compensation. This includes all department heads, supervisory staff, and exempt personnel whose job duties are directly or indirectly involved in emergency response, coordination, restoration, or recovery activities during the emergency.

21.3 Compensation for Overtime

Eligible exempt employees will be compensated for all **hours worked in excess of forty (40) hours during a designated workweek** at **1.5 times their regular hourly rate**. The regular hourly rate shall be calculated by dividing the employee's annual salary by 2,080.

21.4 Documentation Requirements

To qualify for overtime pay under this policy:

- Employees must complete and submit a detailed timesheet documenting all hours worked during the emergency.
- Timesheets must be submitted to the Chief Financial Officer or designee in a timely manner, as directed.
- Documentation should be sufficiently detailed to support the City's ability to seek state or federal reimbursement (e.g., FEMA reimbursement) for disaster-related costs. Incomplete or vague records may result in denial of compensation.

21.5 Retroactive Declaration

In some cases, it may be necessary to determine eligibility and compensation after the emergency has occurred. The City Administrator, in coordination with the Mayor and Board of Alders, may authorize the application of this policy retroactively, provided the emergency meets the conditions outlined in Section 20.1 and adequate documentation is available.

22. ADMINISTRATION

The City of Willard's organizational chart illustrates the relationships between positions within departments and across the organization. These relationships may include reporting structures such as the City Administrator to Department Heads, and Department Heads to Supervisors and employees. The chart also helps clarify the alignment of responsibilities, functions, and chains of command.

The official organizational chart is maintained by Human Resources and shall be reviewed and revised any time a new position is created, eliminated, or structurally reorganized. The organizational chart is provided as Appendix F to this manual. Appendix F may be updated administratively at any time to reflect current structure and assignments without requiring reapproval or readoption of the full personnel manual by the Board of Alders.

Employees should follow the organizational structure when seeking direction, resolving work-related issues, or escalating concerns. In most cases, an employee's immediate Supervisor or Department Head should be the first point of contact for guidance on tasks, clarification of responsibilities, or addressing challenges.

The City Administrator has the authority to hire, discipline, and discharge City employees in accordance with applicable laws, policies, and procedures.

23. ADMINISTRATIVE UPDATES TO PERSONNEL MANUAL

To ensure the City of Willard's personnel policies remain current with evolving legal requirements, regulatory standards, and industry best practices, the City Administrator is authorized to make administrative updates to the Personnel Manual, in whole or in part, without requiring reapproval or formal readoption of the entire manual by the Board of Alders.

Administrative updates must be reviewed and approved in advance by the City's legal counsel to ensure compliance with applicable laws and regulations. Upon legal review and approval, such updates shall be documented in the form of a memo titled *Personnel Policy Update*, issued by the City Administrator through Human Resources, and distributed to all staff.

The memo shall specify:

- The section(s) updated
- The reason for the update
- The effective date of the change
- Instructions, if any, for implementation

Nothing in this section shall permit administrative changes that materially alter the terms of employment for any employee or group of employees without consultation with legal counsel and, where appropriate, Board notification or approval.

APPENDICES

A. CODE OF ETHICS
B. OUTSIDE EMPLOYMENT DISCLOSURE AND REQUEST FORM
C. ORGANIZATIONAL CHART
D. EMPLOYEE RECEIPT AND ACCEPTANCE

Appendix A – Code of Ethics

Overview and Values

City of Willard employees are expected to uphold the highest standards of ethics and professionalism, reflecting the trust placed in them by the community. This Code of Ethics outlines key responsibilities and behavioral expectations that support efficient operations, safeguard public trust, and ensure a respectful, inclusive, and legally compliant workplace.

In delivering public service, the City values:

- **Integrity** and excellence in all actions;
- **Transparency and openness** to diverse perspectives;
- **Respect for diversity** in people and approach.

This appendix covers general conduct expectations and specific ethical provisions.

Definitions

- **Appointing Authority**: A person authorized to make final hiring decisions and approve or deny personnel-related transactions.
- **Supervisor**: The employee responsible for directly overseeing another employee's work, including timekeeping, evaluations, and discipline.
- **Equipment, Materials, and Supplies**: City-owned or issued items such as phones, computers, vehicles, tools, keys, and office supplies.
- **Gratuity**: Any gift, favor, discount, service, or hospitality not paid for at fair market value.
- **Staff/Employee**: These terms are used interchangeably throughout this document.

1. Professional Conduct

City employees must demonstrate integrity, courtesy, and professionalism in all dealings with citizens, coworkers, and the public. They must refrain from conduct, on or off duty, that discredits the City or impairs job performance.

Employees must:

- Perform duties with honesty and impartiality;
- Avoid any real or perceived conflict of interest;
- Obey applicable laws, policies, and procedures;
- Conduct themselves in ways that promote public confidence in City government.

Unacceptable behaviors include:

- Profanity, abuse, threats, or discriminatory slurs;
- False or harmful gossip about employees or residents;

- Physical aggression or intimidation;
- Appearing at work in a condition unsafe for duty (e.g., intoxication);
- Harassment or discrimination based on any protected class;
- Retaliation against individuals reporting misconduct.

2. Arrests and Criminal Charges

Employees must notify their supervisor within five (5) days of any arrest, conviction, plea of guilty, or court-ordered sentence for a misdemeanor or felony offense. Incarceration does not justify use of leave. Absences caused by incarceration may be grounds for termination.

The City Administrator will review each case to determine if continued employment is appropriate.

3. Confidential Information

Employees must not disclose or use confidential information acquired in the course of employment except as authorized. Breach of confidentiality is grounds for discipline, including termination.

4. Gratuities and Gifts

Employees and their immediate households may not accept gifts, favors, or services from any person or entity:

- Doing business with the City;
- Regulated by the City; or
- Whose interests may be substantially affected by the employee's job duties.

Permitted exceptions include:

- Unsolicited promotional items (e.g., pens, notepads) valued under $25;
- Public awards, trophies, or contest prizes;
- Meals offered to all attendees at conferences or public-interest events;
- Vendor-provided meals or training open to all clients.

All questionable gratuities must be reported to the employee's supervisor immediately.

5. Use of City Position

Employees must not use their role with the City to improperly influence, coerce, or pressure others for personal benefit. Authority must be exercised professionally, fairly, and respectfully.

6. Non-Retaliation

Retaliation against any individual who raises concerns, reports misconduct, or participates in an investigation is strictly prohibited.

The City will investigate all reports of retaliation. Verified retaliation will result in disciplinary action, up to and including termination.

7. Solicitation

Employees may not solicit or sell goods or services during working hours or at their work location. Exceptions may be made for charitable or educational efforts (e.g., Girl Scout cookies, school fundraisers), but must be discreet and non-disruptive.

8. Use of City Property and Resources

Employees must use City equipment, facilities, and supplies solely for City business. Examples include vehicles, phones, internet access, office equipment, and tools.

Misuse, theft, or negligent damage may result in discipline and personal liability.

Other key provisions:

- Employees must report all lost or stolen City property immediately.
- Personal phone calls must be minimal and non-disruptive.
- All work products created for the City belong to the City.
- Employees may not use their own personal devices or software for City work without supervisor approval.

Supervisors or the City Administrator may inspect workspaces and City-owned devices as needed for business or compliance purposes.

9. Staff Responsibilities

Employees are expected to:

- Read and understand City policies;
- Cooperate fully with investigations;
- Use time and leave appropriately and responsibly;
- Be punctual and meet performance standards;
- Follow lawful instructions from supervisors;
- Refrain from falsifying records (e.g., timesheets, expense reports);
- Not use personal devices to secretly record work conversations unless authorized by management.

10. Computer, Email, and Internet Use

All internet and system use must be work-related. Employees may not install unauthorized software or use systems for personal gain, illegal activity, or offensive content.

Prohibited uses include:

- Accessing or downloading obscene, hateful, or illegal content;
- Discrimination, harassment, or threatening communications;

- Using City systems for personal sales, chain emails, or political messages;
- Software or media piracy;
- Circumventing security or introducing malware.

The City may monitor computer use at any time.

11. Romantic Relationships

Romantic relationships between supervisors and their direct reports are strictly prohibited. Such relationships create a conflict of interest and must be disclosed and addressed immediately by HUMAN RESOURCES.

Inappropriate conduct includes:

- Romantic emails or gifts in the workplace;
- Adult jokes or suggestive content;
- Unreported relationships within supervisory chains.

If you have questions or concerns about any portion of the Code of Ethics, contact the City Administrator or Human Resources immediately.

Appendix B – Employee Offboarding Checklist (Sample)

To be completed by HUMAN RESOURCES in collaboration with Department Head and IT prior to employee's final day.

Employee Name: ____________________
Position: ____________________
Department: ____________________
Separation Date: ____________________

A. Property & Equipment Return

-

B. IT Notification and Access Control

-

C. Final HR Review

-

Prepared By: ____________________

Date Completed: ____________________
Checklist to be retained in personnel file. Contact HUMAN RESOURCES for questions or updates.

Appendix C – Outside Employment Disclosure and Request Form

City of Willard

Outside Employment Disclosure and Request for Approval
This form must be completed and submitted for approval prior to engaging in any outside employment. Approval must be renewed annually or upon any change in outside employment status. This form is required under Section 17 of the Personnel Manual.

Employee Information

- **Name:** ____
- **Department:** ___________________________________
- **City Position Title:** ______________________________
- **Supervisor's Name:** _____________________________

Outside Employment Details

- **Name of Outside Employer/Business:** ____________________________________
- **Type of Work Performed:** ____
- **Employer Address/Location:** ____
- **Schedule (Days/Hours):** ____
- **Start Date of Outside Employment:** ______________________________________
- **Is this employment expected to be:**
  ☐ Temporary
  ☐ Ongoing/Long-Term

Disclosure Questions (check all that apply):
☐ The outside work will occur only outside of scheduled City work hours.
☐ No City equipment, vehicles, resources, uniforms, or confidential information will be used.
☐ The outside employment will not impair my ability to perform City duties.
☐ The work is not with a vendor, contractor, or entity regulated by the City.
☐ There is no conflict of interest, real or perceived.
☐ I understand that any changes to this arrangement must be re-disclosed.

Please describe how you will ensure there is no conflict with your City responsibilities:

Employee Signature

I certify that the above information is true and complete. I understand that failure to disclose or obtain approval for outside employment may result in disciplinary action.

Signature: ___________________________ Date: _______________

Supervisor Review

☐ I have reviewed this request and recommend:
- ☐ Approval
- ☐ Denial

Comments: ____

Supervisor Signature: _____________________ Date: _______________

City Administrator Final Decision

☐ Approved
☐ Denied

Conditions (if any): ____

City Administrator Signature: __________________ Date: _______________

Appendix D – Organizational Chart

Appendix E. EMPLOYEE RECEIPT AND ACCEPTANCE

I hereby acknowledge receipt of the City of Willard Employee Policy Manual. I understand that it is my continuing responsibility to read and know its contents. I also understand and agree that the Employee Policy Manual is not an employment contract for any specific period of employment or for continuing or long-term employment. Therefore, I acknowledge and understand that unless I have a written employment agreement with the City of Willard that provides otherwise, I have the right to resign from my employment with the City of Willard at any time with or without notice and with or without cause, and that the City of Willard has the right to terminate my employment at any time with or without notice and with or without cause.

I have read, understand and agree to all of the above. I have also read and understand the City of Willard Employee Manual. I agree to return the City of Willard Employee Manual upon termination of my employment.

Signature ____

Print Name ____

Date ________________________

CONFIDENTIALITY POLICY AND PLEDGE

Any information that an employee learns about the City of Willard or its staff as a result of working for the City of Willard that is not otherwise publicly available constitutes confidential information. Employees may not disclose confidential information to anyone who is not employed by the City of Willard or to other persons employed by the City of Willard who do not need to know such information to assist in rendering services. The disclosure, distribution, electronic transmission or copying of the City of Willard’s confidential information is prohibited. Any employee who discloses confidential information will be subject to disciplinary action (including possible termination), even if they do not actually benefit from the disclosure of such information.

I understand the above policy and pledge not to disclose confidential information.

Signature ____

Print Name ____

Date ________________________

5.5 Overtime Compensation and Compensatory Time

All policies governing overtime/compensatory time shall follow the requirements of the Fair Labor Standards Act (FLSA).

5.5.1 Overtime Compensation

- Overtime pay applies only to non-exempt employees and is calculated at 1.5 times the regular hourly rate for actual hours worked in excess of 40 per week.
- Paid leave, including sick days, vacation days, or other non-working paid days, shall not count toward overtime eligibility.
- Overtime must be approved in advance by a Department Head and the CA or CFO.

5.5.2 Compensatory Time

- Based on departmental needs, an employee may receive, in lieu of overtime compensation or upon written agreement with the Department Head and City Administrator, compensatory time off at a rate of one and 1.5 hours for each hour worked for which overtime compensation would otherwise be required by this section.
- “Compensatory time” and “compensatory time off” mean hours during which an employee is not working but receives paid time off at the employee’s regular rate.
- Non-exempt City employees may accrue up to a maximum of 160 hours of compensatory time. Any hours earned in excess of the maximum limits must be paid as overtime for non-exempt employees.
- Employees shall be permitted to use accrued compensatory time within a reasonable time period after it is requested unless to do so would unduly disrupt the operation of the City.
- Employees are encouraged to utilize their compensatory time in the year it is earned. A maximum of 60 hours may be carried over from one calendar year to the next. Any hours in excess of this limit as of December 31st will be paid out to non-exempt employees at the employee’s current regular rate of pay in the first pay period of January.
- Upon termination or resignation, accrued compensatory balances will be paid to the employee, subject to the employee abiding by the requirements of this

manual regarding Separation of Employment. Payment will be at the hourly rate of pay being received on the date of the separation of employment.

5.6 Holiday Pay

- All full-time employees and appointed officers shall receive normal compensation for legal holidays and any other day or part of a day during which the City's public offices are closed by special proclamation of the Mayor, with approval from the Board of Alders.
- A holiday is a <u>maximum</u> period of eight (8) hours, paid at the employee's regular rate.
- If a holiday falls on a Saturday, City offices will close on the preceding Friday.
- If a holiday falls on a Sunday, City offices will close on the following Monday.

5.6.1 Observed Holidays

- **New Year's Day**
- **Martin Luther King Jr. Day**
- **President's Day**
- **Memorial Day**
- **Juneteenth**
- **Independence Day**
- **Labor Day**
- **Columbus Day**
- **Veterans Day**
- **Thanksgiving Day**
- **Friday after Thanksgiving**
- **Christmas Eve**
- **Christmas Day**
- **New Years Eve**

5.6.2 Holiday Pay Rules

- If the City is closed and you are not scheduled to work
    - Employees will receive 8 hours of holiday pay at their regular rate, regardless of their normal schedule.
- If you work on the holiday
    - Employees required to work on a City-recognized holiday will receive 2× their regular hourly rate for all hours worked on the holiday
- **If you normally do not work that day and your schedule is unchanged -** If the holiday falls on a day the employee is not normally scheduled to work, and the employee's schedule is not adjusted:
    - The employee receives no holiday pay
    - The employee receives no additional compensation
- **No schedule manipulation -** Departments may not adjust an employee's schedule solely to avoid or increase holiday pay.
- **Overtime Interaction -** Holiday hours do not count toward overtime calculations. Only hours actually worked count toward overtime thresholds.

5.6.3 Summary Table

Scenario	Pay Outcome
City closed, employee not working due to closure	8 hours at regular rate
Employee works on holiday	2× regular rate for all hours worked
Employee not scheduled that day, schedule unchanged	No holiday pay
Schedule changed to avoid or increase holiday pay	Not permitted

5.7 Vacation Leave

Length of Employment	Hours Accrued Per Pay Period	Maximum Accrued Vacation Per Year

0 to 1 Year	1.54 hours	40 hours (1 week)
1 to 4 Years	3.08 hours	80 hours (2 weeks)
5 to 11 Years	4.62 hours	120 hours (3 weeks)
12 to 14 Years	6.16 hours	160 hours (4 weeks)
15+ Years	7.70 hours	200 hours (5 weeks)

Vacation Policy Details:

- Employees must complete six (6) months of employment and successfully finish their probation period before using vacation leave.
- Vacation does not accrue during unpaid leaves of absence.
- Employees must request vacation time in advance and receive approval from their Department Head (or City Administrator for Department Heads).
- Employees may carry over up to 160 hours (20 days) of vacation leave into the next calendar year.
- Upon termination or resignation, employees with one (1) year of service or more shall be paid out for their unused vacation days (up to 160 hours).
- Upon termination or resignation, accrued vacation days will be paid to the employee, subject to the employee abiding by the requirements of this manual regarding Separation of Employment.

5.8 Sick Leave

Length of Employment	**Hours Accrued Per Pay Period**	**Maximum Accrued Sick Leave Per Year**
0 to 1 Year	1.54 hours	40 hours (1 week)
1+ Years	3.08 hours	80 hours (2 weeks)

Sick Leave Policy Details:

- Employees may use sick leave in quarter hour increments.
- Sick leave may be used for personal illness, injury, or to care for an immediate family member (subject to supervisor approval).

- Employees may accumulate up to 280 hours (35 working days) of sick leave, which rolls over annually.
- Sick leave does not accrue during unpaid leave.
- Employees do not receive a payout for unused sick leave upon separation from the City.

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Caitlin Goebel

SUBJECT:

ON CALL PROCEDURES

Monday Morning Clerk Verification *(To be completed every Monday at the start of shift)*

- Clerk Name: ___________________________
- Employee Name:___________________________
- Date: ___________________
- Time: ___________________
- Equipment Inventory Verified:
  - Phone Yes ☐ No ☐
  - Vehicle Yes ☐ No ☐
  - Fuel Card Yes ☐ No ☐
- Fuel Level Verified: ¼ ☐ ½ ☐ ¾ ☐ Full ☐ Refueled Yes ☐ No ☐
- Mileage out ___________________
- Mileage return ___________________

Clerk Initials: ___________________ **Employee Initials:** ___________________

Notes____

Monday Morning Clerk Verification *(To be completed every Monday at the start of shift)*

- Clerk Name: ___________________________
- Employee Name:___________________________
- Date: ___________________
- Time: ___________________
- Equipment Inventory Verified:
  - Phone Yes ☐ No ☐
  - Vehicle Yes ☐ No ☐
  - Fuel Card Yes ☐ No ☐
- Fuel Level Verified: ¼ ☐ ½ ☐ ¾ ☐ Full ☐ Refueled Yes ☐ No ☐
- Mileage out ___________________
- Mileage return ___________________

Clerk Initials: ___________________ **Employee Initials:** ___________________

Notes____

Standby, On-Call, and Take-Home Vehicle Policy

1. Purpose

This policy establishes the rules, responsibilities, and compensation structure for employees assigned to standby duty, called out after normal working hours, or issued a take-home vehicle. It ensures operational readiness, accountability, and consistent expectations across departments.

2. Standby Compensation

Employees assigned to standby duty will receive a flat daily rate as follows:

- **Regular workdays:** $10 per day
- **Weekends and designated City holidays:** $30 per day

Standby pay applies to employees required to remain available for immediate response outside their normal work schedule.

3. On-Call Compensation

3.1 Weekday Call-Outs

Employees called out during the regular work week will receive:

- A minimum of **two (2) hours at their overtime rate**
- Additional calls during the same call-out period are compensated **only for actual time worked** beyond the initial minimum.

3.2 Weekend & Holiday Call-Outs

Employees called out on weekends or designated holidays will receive:

- A minimum of **three (3) hours at their overtime rate**
- Additional calls during the same call-out period are compensated **only for actual time worked** beyond the initial minimum.

3.3 On-Call Period Definition

A On-Call period begins when the employee is contacted and ends when the employee returns home or their normal standby location. Multiple calls within this period do not trigger additional minimums.

4. Response Requirements

Employees assigned to standby duty must:

- Remain reachable by phone
- Respond within the required timeframe and live within 20 miles
- Remain fit for duty (no alcohol or impairing substances)
- Maintain possession of the assigned City phone/device

Failure to meet response requirements may result in disciplinary action.

5. Take-Home Vehicle Responsibilities
Employees issued a take-home vehicle must:

- Use the vehicle for **business purposes only**, unless otherwise approved
- Keep the vehicle clean, fueled, and in safe operating condition
- Report maintenance issues immediately
- Use assigned fuel cards only for the designated vehicle
- Secure the vehicle and all equipment at all times

6. Weekly Vehicle & Phone Check-In Requirement
All employees assigned a take-home vehicle or City-issued phone must report to the Public Works office **every Monday morning, or the next business day in instance of a holiday, at the start of the workday** to complete the following with a Public Works Clerk:

- Check in/out their assigned vehicle for the week
- Verify possession and condition of the assigned equipment
- Confirm fuel level, mileage, and equipment inventory
- Report any damage, missing equipment, or operational issues
-

Failure to complete the Monday check-in may result in loss of take-home privileges or disciplinary action.

7. Residency Requirement
Employees in roles supporting critical infrastructure (e.g., electric, water/wastewater operators, emergency response personnel) may be required to live within a **20 mile radius** of their designated reporting location to ensure timely response.

7.1 Grandfather Clause
Employees employed by the City prior to the adoption of this policy are exempt from the residency requirement and will not be required to relocate. The residency requirement applies only to new hires or employees who voluntarily move outside the required radius after the policy's effective date.

7.2 On-Call Assignment When No Employees Reside Within the Required Radius
If no actively employed staff members meet the residency requirement for on-call coverage, the next closest qualified employee will be assigned on-call duties. The assignment will be determined by Human Resources or the City Administrator, based on proximity, operational needs, and the employee's ability to respond in a timely manner.

8. Accidents, Damage, and Reporting
Employees must report any accidents, damage, or traffic citations involving a City vehicle as soon as safely possible. Employees must cooperate fully with investigations. Unsafe driving or repeated violations may result in loss of vehicle privileges.

9. Equipment & Confidentiality
Employees must protect all tools, documents, and electronic devices stored in City vehicles. Vehicles must remain locked when unattended.

10. Return of Vehicle and Equipment

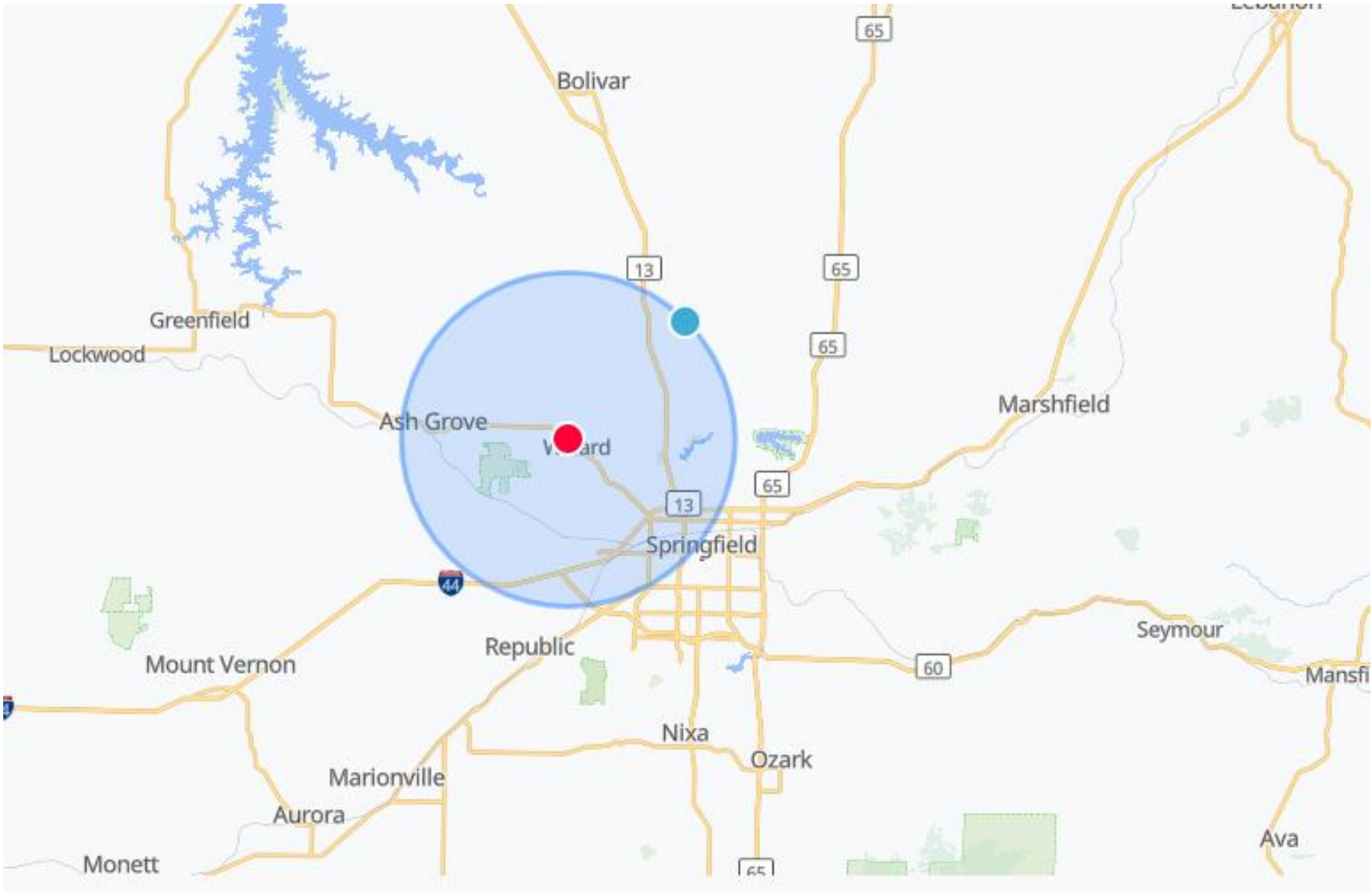
Employees must return the take-home vehicle, keys, fuel cards, and all assigned equipment:

- Upon request
- When privileges are suspended
- When job duties change
- Upon separation from employment

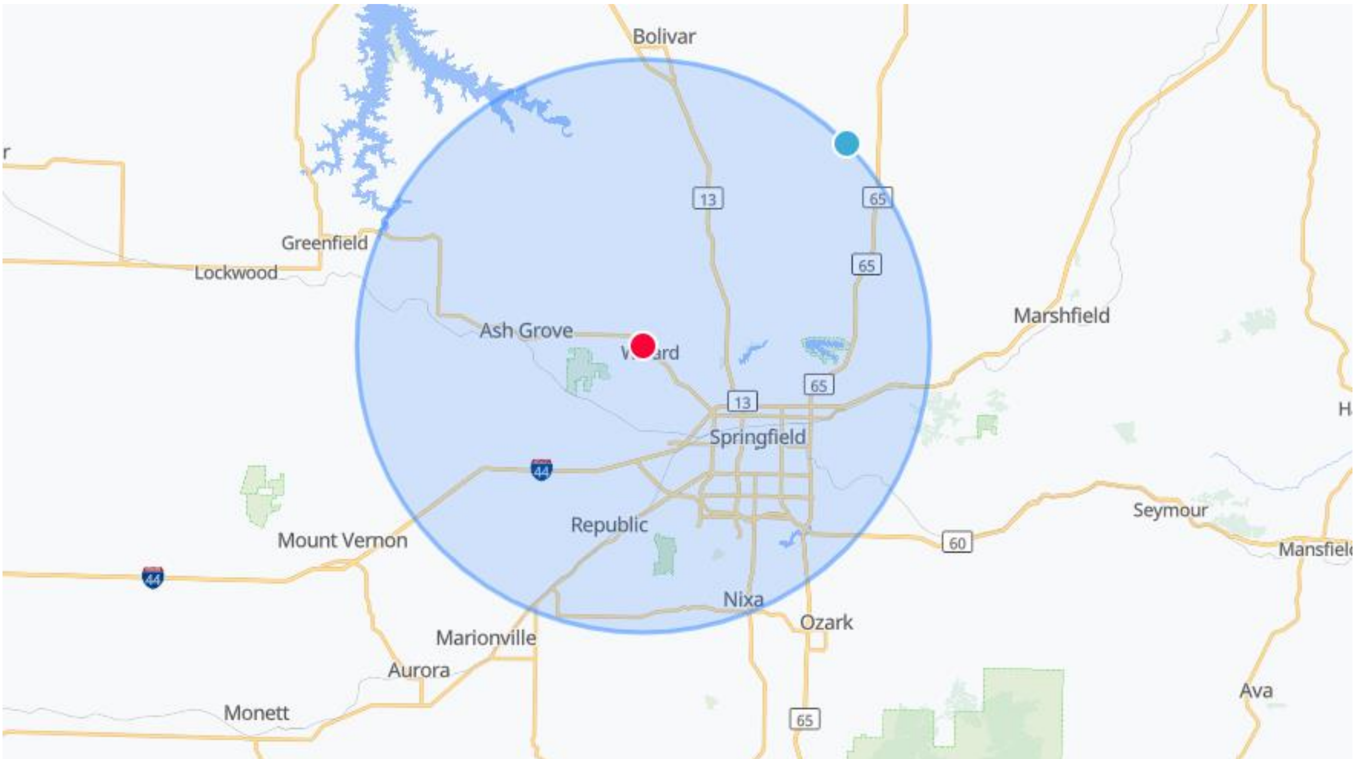
All items must be returned in good condition.

11. Policy Violations
Misuse of a take-home vehicle, failure to meet standby or On-Call expectations, or failure to comply with check-in requirements may result in disciplinary action up to and including termination. Employees may be held financially responsible for negligent damage

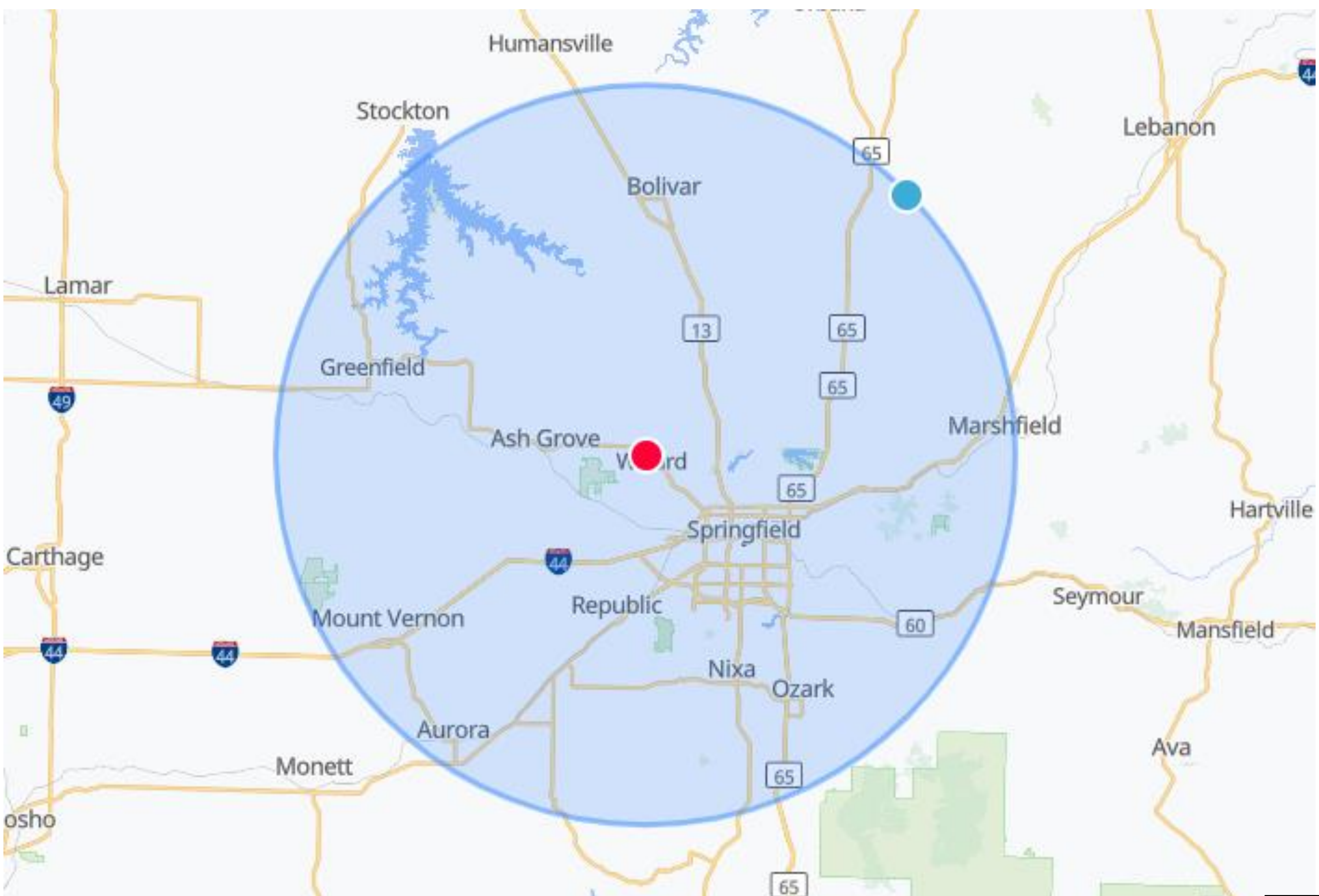
ON CALL 10 MILES



20 MILES



30 MILE



Fleet Vehicle Daily Log *(One sheet per vehicle, per day)*
Vehicle Number / Unit ID: ___________________________ Date:
____

A. Start-of-Day Information

- **Driver Name:** ____________________________
- **Start Time:** ____________________________
- **Starting Mileage:** ____________________________
- **Fuel Level (Start):** ¼ ☐ ½ ☐ ¾ ☐ Full ☐
- **Passengers (if any):** ____

B. End-of-Day Information

- **End Time:** ____________________________
- **Ending Mileage:** ____________________________
- **Fuel Level (End):** ¼ ☐ ½ ☐ ¾ ☐ Full ☐

C. Trip Details (Optional - if leaving the City of Willard)

Time Out	Time In	Purpose of Trip (Daily work, out of town assignment, call-out)	Passengers	Mileage Out	Mileage In
________	________	________	________	________	________
________	________	________	________	________	________
________	________	________	________	________	________

D. Vehicle Condition & Issues
Check all that apply:

- **New Damage Noticed:** Yes ☐ No ☐
- **Warning Lights On:** Yes ☐ No ☐
- **Mechanical Issues:** Yes ☐ No ☐
- **Tires OK:** Yes ☐ No ☐
- **Interior Clean:** Yes ☐ No ☐
- **Exterior Clean:** Yes ☐ No ☐

If **Yes** to any issues, describe below:
Issue Description:
____

E. Notes (Anything unusual, fuel purchases, equipment concerns, etc.)
____
____
____

F. Signatures
Driver Signature: ____________________________

Clerk Initials: ______________________________

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Caitlin Goebel

SUBJECT:

TAKE HOME VEHICLE POLICY

Standby & Called-Out Policy

1. Purpose - This policy establishes compensation, expectations, and response requirements for employees assigned to standby duty or called out after normal working hours.

2. Standby Compensation - Employees assigned to standby duty will receive a **flat daily standby rate** based on the day of the week:

- **Regular workdays:** $30 per day
- **Weekends and designated City holidays:** $60 per day

Standby pay is provided to employees who are required to remain available for immediate response outside their normal work schedule.

3. Call-Out Compensation - When an employee on standby is required to respond to a call-out:

3.1 Weekday Call-Outs

- Minimum compensation: **2 hours at the employee's overtime rate**
- Additional calls during the same call-out period are paid **only for actual time worked** beyond the initial minimum.

3.2 Weekend & Holiday Call-Outs

- Minimum compensation: **3 hours at the employee's overtime rate**
- Additional calls during the same call-out period are paid **only for actual time worked** beyond the initial minimum.

4. Call-Out Period Definition - A call-out period begins when the employee is contacted and ends when the employee returns home or to their normal standby location. Multiple calls within this period do not trigger additional minimums.

5. Response Requirements

Employees on standby must:

- Remain reachable by phone
- Be able to respond within the required timeframe (typically 30 minutes unless otherwise specified)
- Remain fit for duty (no alcohol or impairing substances)
- Have the assigned City phone/device in their possession

5.1 **Vehicle & Phone Check-In Requirement**

Standby & Called-Out Policy

Employees assigned a take-home vehicle and/or City-issued phone must **report to the Public Works office at the start of the workday each Monday morning** to complete the following with a Public Works Clerk:

- **Check out** their assigned vehicle for the week
- **Verify possession and condition** of the assigned City phone/device
- **Confirm fuel level, mileage, and equipment inventory**
- **Report any damage, missing equipment, or operational issues**

This check-in is mandatory for all employees participating in the standby rotation or assigned a take-home vehicle. Failure to complete the Monday morning check-in may result in loss of take-home privileges or disciplinary action.

6. Residency Requirement

Certain positions that support critical infrastructure (e.g., electric lineworkers, water/wastewater operators, emergency response technicians) may be required to live within a **30-minute travel radius** of their designated reporting location to ensure timely response.

7. Special Provisions for Departments With Accrued Holidays

If your organization has departments where holidays are **accrued** rather than observed on fixed dates (similar to police departments):

- Employees using an accrued holiday will receive the **weekday standby rate**
- Call-outs during an employee's scheduled holiday time will follow the **weekday minimum**

This ensures consistency between departments with fixed holidays and those with flexible holiday scheduling.

8. Failure to Respond - Failure to respond to a call-out, repeated missed calls, or failure to meet response requirements may result in disciplinary action.

9. Policy Review

This policy may be updated as operational needs change. Supervisors will notify employees of any revisions.

Commented [WC1]: May be doing away with accrued holidays

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Wes Young

SUBJECT:

AN ORDINANCE OF THE CITY OF WILLARD, MISSOURI, ADOPTING THE CITY OF WILLARD ECONOMIC DEVELOPMENT INCENTIVE POLICY.

The City of Willard, Missouri

Economic Development Incentives Policy

Adopted and approved by the Board of Alders
this 6th day of July, 2026

Table of Contents

City of Willard MISSOURI

PURPOSE STATEMENT

The City of Willard is dedicated to achieving the highest quality of development, services, infrastructure, and quality of life for its citizens. One of the primary keys for achieving these goals is to enhance and expand the local economy. Competition for attracting new businesses and employers, as well as retaining the ones already in existence in the community, can be aggressive from time to time at national, regional, interstate, and intrastate levels. For this reason, the City recognizes that the appropriate use of economic development incentives may be necessary in the correct circumstances to aid the City in reaching its full economic potential.

The purpose of this document is two-fold: First, the policy component of this document establishes the goals, standards, guidelines, and preferences of the City to direct the use of economic incentives to ensure that these incentives are used in a way that advances the City's economic goals. These policies allow the City to be proactive (not reactive) with respect to requests from applicant developers and businesses to create the public-private partnerships, which are the real result of granting incentives in any instance. These policies serve as a guide to developers and businesses far and wide to attract those having concepts, ideas, and plans that closely match the development needs of the City. Conversely, these policies also inform the development and business community that incentives for businesses already supported in the City, or for which there is no longer a community need, may be more difficult to obtain, unless incentives would assist an existing business in reinvestment in and expansion of their existing enterprise.

Second, the procedures component of this document establishes a uniform, transparent, and well-informed path for businesses and developers to follow when seeking economic development incentives of the City. We believe that through a standard approach the expectations of applicants can be managed at reasonable levels, which leads to a more positive experience for those seeking incentives. The uniform application of these procedures ensures that the goals and needs of the City are being specifically considered for each economic development incentives request, which leads to greater long-term success of the program as a whole. Finally, these procedures address the ongoing execution of each approved incentive application thereby confirming that the applicant will be held accountable for delivering the promised investment in the community, which in turn builds confidence in the City's incentives program by its citizens and the other affected taxing jurisdictions that are the City's neighbors.

Nevertheless, the applicability of the differing incentives programs often varies from project to project, and the Board of Aldermen's decision to grant incentives is discretionary, based upon one or more of the criteria set forth in this document and other outside factors. The Board of Aldermen is under no obligation to approve any requested incentives that are not required by state or local laws, and it reserves the right to deviate from these policies and procedures at its sole discretion when doing so is deemed to be in the best interests of the City.

City of Willard MISSOURI

ECONOMIC DEVELOPMENT GOALS

The Board of Aldermen has set certain goals and identified areas of priority to aid in the City's economic development. In evaluating an incentives proposal, the Board of Aldermen has discretion to consider whether or not a proposed project supports the City's economic development goals and areas of priority for continued development in the City. The Board of Aldermen also has the discretion to determine that a project supports an economic development goal of the City that is not prescribed in this Policy. Applicants who propose projects that support with these goals have a higher likelihood of success than applicants who propose projects that do not support these goals. Projects should also encourage economic development growth of the City in accordance with the City's Comprehensive Plan. The Board of Aldermen shall regularly update these economic development goals.

The City is currently focused on bringing commercial development to Willard residents. The City of Willard is a bedroom community that prioritizes economic development projects that will keep residents in town after working hours and projects that will offer family fun and entertainment. The City prioritizes well-known, casual dining restaurants that offer residents the ability to stay in town for lunch and dinner, such as Texas Roadhouse, Andy's Frozen Custard, 7 Brew, and other similar dining options. The City also strongly desires a small grocery store chain like Aldi. The City encourages projects that provide a place to play for families and residents, including recreational and entertainment facilities. While residential development is an ongoing goal of the City, the City intends to utilize economic development incentives for residential projects when necessary to assist in infrastructure development to support residential developments. A long-term goal of the City is to develop a hotel in the southern area of the City for convenient access for patrons of the Springfield-Branson National Airport. Overall, the City's prioritizes the use of economic development incentives for necessary updates to the City's sewer infrastructure, along with other utility infrastructure.

GENERAL POLICY AND PROCEDURE GUIDELINES

To implement the City's economic development incentive program, certain overarching concepts apply. These concepts, which are listed in detail below, fall into the categories of both the policy and procedural components of the City's overall program. Applicants with the highest likelihood of success will address each of these general policy issues and procedural steps in addition to the policy issues and procedural steps that apply to the specific economic incentive tool or tools applied for and described in more detail in this document.

General Policy Matters

- All proposals for use of economic development incentives are subject to the approval of the Board of Aldermen and shall be considered on a case-by-case basis. The Board of Aldermen may deny use of economic development incentives for any project.
- Proposed projects shall encourage economic development in accordance with the City's Comprehensive Plan and Zoning Map. Proposed projects shall address strategies, actions, and metrics identified in the City's Comprehensive Plan and shall be appropriate for the zoning district the project is located within.
- All projects must demonstrate that the project would not occur "but for" the incentives offered. Incentives will be granted only at the level necessary to make the project financially feasible. Terms for incentives will be the least amount of time necessary to make the project financially feasible.
- Applicants must obtain their own competent legal counsel.
- To avoid economic development tool fixation and potential over-incentivization, it is important for the Board of Aldermen to establish and regularly update economic development goals of the City. The Board of Aldermen should invest in appropriate market studies and due diligence to best identify the City's economic development goals.
- Elected or appointed City officials and City staff shall not engage in ex-parte communications regarding use of economic development incentives in connection with contemporaneous or future proposals for such use. Applicants shall not rely on ex-parte promises, commitments, or similar communications made by an individual elected or appointed City official or City staff member regarding an Applicant's contemporaneous or future proposal for use of economic development incentives, no matter how informal such proposal may be. Applicants acknowledge that the discretion to approve incentive applications is reserved for the Board of Aldermen.
- When funds exist, either from the City's budget or supplementary grants or other funding sources, or a combination thereof, the City should obtain, maintain, and update a market study designed to identify the economic development needs of the City for utilization in the review of economic development requests.
- Applicants must demonstrate that the private investment (through equity, private financing, or a combination thereof) is greater than the incentives requested. The preferred ratio of investment to incentive is 5:1 (i.e., the incentives request should be 25% or less of the total proposed project costs). Projects with an unleveraged rate of return with incentives that do not exceed the range of unleveraged rate of return that is most applicable to the proposed development project are preferred.

- The purpose of any requested incentive is to provide additional funding for a specific City-designated economic development goal; or, if not, the applicant has provided justification and supporting documents (e.g., third-party market studies, etc.) explaining why the purpose of the request should be a City-designated economic development goal.
- To ensure that the City's interests are adequately protected and that the citizens and current business partners of the City of Willard are not bearing the burden of the costs to review requests for public aid through economic development incentives, applicants will be required to enter into a funding agreement whereby the applicant provides funds to the City so that the City can obtain professional consultants necessary to aid City staff and elected officials in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. The funding agreement shall provide for a deposit with the City The City's expenses may include, but are not limited to, fees for special legal and financial consultation, market study reviews, appraisal reviews, and if applicable, bond underwriters and bond counsel. These costs may be reimbursed through the incentive program as allowed by law.
- If financial or reputational risk to the City warrants, or when the level and type of economic development incentives reaches or exceeds an appropriate amount, the City will conduct, and the applicant should expect to provide, a review of its relevant business experience, financial condition, ability to carry out the proposed project, and criminal background. The Board of Aldermen reserves the right to deny incentives based on the information provided and investigated in such review. Applicants are notified that the level of scrutiny into the Applicant's background will vary ratably with the amount of public incentives and public risk associated with the level of incentives requested in the application.
- Projects utilizing funds created from the development to reimburse development costs ("pay-as-you-go") are highly encouraged. The use of public debt should be limited to only that amount absolutely necessary, which fact will be the applicant's responsibility to justify in the approval process.
- Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
- Taxes will not be reduced below the base year, as established by each applicant.
- All projects are subject to annual appropriation from the Board of Aldermen.
- The City shall require periodic reporting evidencing compliance with the requirements of the incentive received and measure the economic benefit to the City and the region. Agreements may include specific performance requirements as a condition for granting and maintaining the abatement or incentive.
- Applicants are encouraged to consider a combination of incentives to achieve a balance that evens out the efforts of the incentives among the affected taxing jurisdictions.

General Procedural Requirements

- Applicants for any economic development incentive program granted by the City must schedule and attend a pre-application meeting with City staff prior to submitting an application.
- The City will provide basic forms, a summary of the application, review, and consideration process, applicable statutory requirements, and an estimated timeline for the approval process, in addition to other relevant information, at the pre-application meeting.
- Applicants will be expected to work with City staff and City consultants, while preparing the applicable "official" document to be placed on file with the City, thus triggering the applicable statutory review process.

- Applicants will be required to enter into a funding agreement whereby the applicant provides fun City for it to obtain professional consultants necessary to aid in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. An initial deposit will be required before the City's staff and consultants will begin work processing the applicant's proposal. The amount of the funding agreement deposit will vary depending upon the application or applications filed, and Applicants are hereby notified that the funding agreement will contain an "evergreen" clause whereby the Applicant must replenish the fund as it is used to ensure the full amount of the deposit is available to the City for use in reviewing the application. Applicants are placed on notice that the costs associated with a funding agreement are not refundable in the event that the application is not approved. Payment of the associated costs does not guarantee approval of the application by the TIF Commission or Board of Aldermen, whose decisions shall remain at their sole discretion.
- Applicants shall consider reimbursement of the City's costs to review and consider the approval of the application, and in the event the application is approved, to administer the incentive program while it remains active, as components of the overall project costs. Applicants also shall provide a mechanism for the prompt payment of the City's costs in its application. The City's costs associated with the consideration of the approval of an application shall be paid in full at the time of any applicable hearing or meeting to consider a recommendation of approval or the approval of the application. The City reserves the right to postpone such hearing or meeting until the necessary payments have been made.

COMMERCIAL, RETAIL, AND ENTERTAINMENT DEVELOPMENT

The City of Willard encourages the use of economic development incentives to spur new commercial and entertainment development within the City. The City desires commercial development that will encourage residents to stay in town after working hours; this includes the development of well-known, casual dining offerings and the development of a small grocery store such as Aldi. The City also desires family friendly entertainment and recreational facilities that will encourage the community to gather together and provide a place for families to play. It is the City's long-term goal to develop a hotel in the southern area of the City for convenient access for patrons of the Springfield-Branson National Airport. Overall, the City desires commercial and entertainment development that encourages residents and visitors to stay in Willard rather than travel to surrounding communities. In addition, the City encourages the use of economic development incentives to improve downtown and historic areas.

General Policy Matters

- All proposals for use of economic development incentives are subject to the approval of the Board of Aldermen and shall be considered on a case-by-case basis. The Board of Aldermen may deny use of economic development incentives for any project.
- All projects must demonstrate that the project would not occur "but for" the incentives offered. Incentives will be granted only at the level necessary to make the project financially feasible. Terms for incentives will be the lease amount of time necessary to make the project financially feasible.
- Applicants must obtain their own competent legal counsel.
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- Applicants must demonstrate that the private investment (through equity, private financing, or a combination thereof) is greater than the incentives requested. The preferred ratio of investment to incentive is 5:1 (i.e., the incentives request should be 25% or less of the total proposed project costs). Projects with an unleveraged

rate of return with incentives that do not exceed the range of unleveraged rate of return that is most a[pplicable] to the proposed development project are preferred.

- The purpose of any requested incentive is to provide additional funding for a specific City-designated economic development goal; or, if not, the applicant has provided justification and supporting documents (e.g., third-party market studies, etc.) explaining why the purpose of the request should be a City-designated economic development goal.
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- If financial or reputational risk to the City warrants, or when the level and type of economic development incentives reaches or exceeds an appropriate amount, the City will conduct, and the applicant should expect to provide, a review of its relevant business experience, financial condition, ability to carry out the proposed project, and criminal background. The Board of Aldermen reserves the right to deny incentives based on the information provided and investigated in such review. Applicants are notified that the level of scrutiny into the Applicant's background will vary ratably with the amount of public incentives and public risk associated with the level of incentives requested in the application.
- Projects utilizing funds created from the development to reimburse development costs ("pay-as-you-go") are highly encouraged. The use of public debt should be limited to only that amount absolutely necessary, which fact will be the applicant's responsibility to justify in the approval process.
- Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
- Taxes will not be reduced below the base year, as established by each Applicant.
- All projects are subject to annual appropriation from the Board of Aldermen.
- The City shall require periodic reporting evidencing compliance with the requirements of the incentive received and measure the economic benefit to the City and the region. Agreements may include specific performance requirements as a condition for granting and maintaining the abatement or incentive.
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<u>Commercial, Retail, and Entertainment Development</u>

- Tax Increment Financing may be appropriate for new commercial, retail, and entertainment development when sales taxes are generated by a new development.
- Sales Tax Reimbursement Agreements may be appropriate for new commercial, retail, and entertainment development when sales taxes are generated by a new development.
- Community Improvement Districts, Neighborhood Improvement Districts, and Transportation Development Districts may be appropriate for new commercial, retail, and entertainment development if the project involves development of public infrastructure.
- Chapter 100 incentives may be appropriate for redevelopment of existing large-scale commercial, retail, or entertainment facilities when the facility holds high-value personal property.
- Beautification grants may be offered by the City for beautification and revitalization of existing commercial, retail, and entertainment facilities.
- Chapter 353 incentives may be appropriate for redevelopment of existing commercial, retail, and entertainment developments if the redevelopment project is in a blighted area and is focused on rehabilitation and revitalization of existing commercial, retail, and entertainment developments.

RESIDENTIAL DEVELOPMENT

The City of Willard encourages the use of economic development incentives to aid in the development of public infrastructure serving residential developments. While the City generally does not utilize economic development incentives for residential developments, it does prioritize the use of incentives when the costs of necessary infrastructure render the development financially impracticable.

General Policy Matters

- All proposals for use of economic development incentives are subject to the approval of the Board of Aldermen and shall be approved on a case-by-case basis. The Board of Aldermen may deny use of economic development incentives.
- All projects must demonstrate that the project would not occur "but for" the incentives offered. Incentives will be granted only at the level necessary to make the project financially feasible. Terms for incentives will be the lease amount of time necessary to make the project financially feasible.
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- Applicants must demonstrate that the private investment (through equity, private financing, or a combination thereof) is greater than the incentives requested. The preferred ratio of investment to incentive is 5:1 (i.e., the incentives request should be 25% or less of the total proposed project costs). Projects with an unleveraged rate of return with incentives that do not exceed the range of unleveraged rate of return that is most applicable to the proposed development project are preferred.
- The purpose of any requested incentive is to provide additional funding for a specific City-designated economic development goal; or, if not, the applicant has provided justification and supporting documents (e.g., third-party market studies, etc.) explaining why the purpose of the request should be a City-designated economic development goal.

- To ensure that the City's interests are adequately protected and that the citizens and current business of the City of Willard are not bearing the burden of the costs to review requests for public aid through economic development incentives, applicants will be required to enter into a funding agreement whereby the applicant provides funds to the City so that the City can obtain professional consultants necessary to aid City staff and elected officials in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. The funding agreement shall provide for a deposit with the City The City's expenses may include, but are not limited to, fees for special legal and financial consultation, market study reviews, appraisal reviews, and if applicable, bond underwriters and bond counsel. These costs may be reimbursed through the incentive program as allowed by law.
- If financial or reputational risk to the City warrants, or when the level and type of economic development incentives reaches or exceeds an appropriate amount, the City will conduct, and the applicant should expect to provide, a review of its relevant business experience, financial condition, ability to carry out the proposed project, and criminal background. The Board of Aldermen reserves the right to deny incentives based on the information provided and investigated in such review. Applicants are notified that the level of scrutiny into the Applicant's background will vary ratably with the amount of public incentives and public risk associated with the level of incentives requested in the application.
- Projects utilizing funds created from the development to reimburse development costs ("pay-as-you-go") are highly encouraged. The use of public debt should be limited to only that amount absolutely necessary, which fact will be the applicant's responsibility to justify in the approval process.
- Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
- Taxes will not be reduced below the base year, as established by each Applicant.
- All projects are subject to annual appropriation from the Board of Aldermen.
- The City shall require periodic reporting evidencing compliance with the requirements of the incentive received and measure the economic benefit to the City and the region. Agreements may include specific performance requirements as a condition for granting and maintaining the abatement or incentive.
- Applicants are encouraged to consider a combination of incentives to achieve a balance that evens out the efforts of the incentives among the affected taxing jurisdictions.

General Procedural Requirements

- Applicants for any economic development incentive program granted by the City must schedule and attend a pre-application meeting with City staff prior to submitting an application.
- The City will provide basic forms, a summary of the application, review, and consideration process, applicable statutory requirements, and an estimated timeline for the approval process, in addition to other relevant information, at the pre-application meeting.
- Applicants will be expected to work with City staff and City consultants while preparing the applicable "official" document to be placed on file with the City, thus triggering the applicable statutory review process.
- Applicants will be required to enter into a funding agreement whereby the applicant provides funds to the City for it to obtain professional consultants necessary to aid in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. An initial deposit will be

required before the City's staff and consultants will begin work processing the applicant's prop… amount of the funding agreement deposit will vary depending upon the application or applications filed, and applicants are hereby notified that the funding agreement will contain an "evergreen" clause whereby the applicant must replenish the fund as it is used to ensure the full amount of the deposit is available to the City for use in reviewing the application. Applicants are placed on notice that the costs associated with a funding agreement are not refundable in the event that the application is not approved. Payment of the associated costs does not guarantee approval of the application by the TIF Commission or Board of Aldermen, whose decisions shall remain at their sole discretion.

- Applicants shall consider reimbursement of the City's costs to review and consider the approval of the application, and in the event the application is approved, to administer the incentive program while it remains active, as components of the overall project costs. Applicants also shall provide a mechanism for the prompt payment of the City's costs in its application. The City's costs associated with the consideration of the approval of an application shall be paid in full at the time of any applicable hearing or meeting to consider a recommendation of approval or the approval of the application. The City reserves the right to postpone such hearing or meeting until the necessary payments have been made.

Residential Development

- Because residential development does not generate sales taxes, Tax Increment Financing is not appropriate for residential developments.
- Community Improvement Districts may be appropriate as a substitute for homeowners' associations.
- Neighborhood Improvement Districts may be appropriate when costs of necessary public infrastructure render the development financially impracticable.
- Chapter 100 incentives may be appropriate for multifamily or workforce housing when the applicant will maintain operation, control, and management of the facilities during the term of the incentives.
- Beautification grants may be offered by the City for beautification and revitalization of exiting residential developments.

City of Willard MISSOURI

INDUSTRIAL AND MANUFACTURING DEVELOPMENT

The City of Willard does not prioritize the use of economic development incentives for industrial and manufacturing development. However, the City does encourage updates to and new development of public infrastructure, and industrial and manufacturing developments may seek assistance with public infrastructure costs. Any industrial or manufacturing development should offer job opportunities to residents and offer wages higher than the Greene County average wage.

General Policy Matters

- All proposals for use of economic development incentives are subject to the approval of the Board of Aldermen and shall be approved on a case-by-case basis. The Board of Aldermen may deny use of economic development incentives for any project.
- All projects must demonstrate that the project would not occur "but for" the incentives offered. Incentives will be granted only at the level necessary to make the project financially feasible. Terms for incentives will be the lease amount of time necessary to make the project financially feasible.
- Applicants must obtain their own competent legal counsel.
- To avoid economic development tool fixation and potential over-incentivization, it is important for the Board of Aldermen to establish and regularly update economic development goals of the City. The Board of Aldermen should invest in appropriate market studies and due diligence to best identify the City's economic development goals.
- Elected or appointed City officials and City staff shall not engage in ex-parte communications regarding use of economic development incentives in connection with contemporaneous or future proposals for such use. Applicants shall not rely on ex-parte promises, commitments, or similar communications made by an individual elected or appointed City official or City staff member regarding an Applicant's contemporaneous or future proposal for use of economic development incentives, no matter how informal such proposal may be. Applicants acknowledge that the discretion to approve incentive applications is reserved for the Board of Aldermen.
- When funds exist, either from the City's budget or supplementary grants or other funding sources, or a combination thereof, the City should obtain, maintain, and update a market study designed to identify the economic development needs of the City for utilization in the review of economic development requests.
- Applicants must demonstrate that the private investment (through equity, private financing, or a combination thereof) is greater than the incentives requested. The preferred ratio of investment to incentive is 5:1 (i.e., the incentives request should be 25% or less of the total proposed project costs). Projects with an unleveraged rate of return with incentives that do not exceed the range of unleveraged rate of return that is most applicable to the proposed development project are preferred.
- The purpose of any requested incentive is to provide additional funding for a specific City-designated economic development goal; or, if not, the applicant has provided justification and supporting documents

(e.g., third-party market studies, etc.) explaining why the purpose of the request should be a City-d economic development goal.

- To ensure that the City's interests are adequately protected and that the citizens and current business partners of the City of Willard are not bearing the burden of the costs to review requests for public aid through economic development incentives, applicants will be required to enter into a funding agreement whereby the applicant provides funds to the City so that the City can obtain professional consultants necessary to aid City staff and elected officials in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. The funding agreement shall provide for a deposit with the City The City's expenses may include, but are not limited to, fees for special legal and financial consultation, market study reviews, appraisal reviews, and if applicable, bond underwriters and bond counsel. These costs may be reimbursed through the incentive program as allowed by law.
- If financial or reputational risk to the City warrants, or when the level and type of economic development incentives reaches or exceeds an appropriate amount, the City will conduct, and the applicant should expect to provide, a review of its relevant business experience, financial condition, ability to carry out the proposed project, and criminal background. The Board of Aldermen reserves the right to deny incentives based on the information provided and investigated in such review. Applicants are notified that the level of scrutiny into the Applicant's background will vary ratably with the amount of public incentives and public risk associated with the level of incentives requested in the application.
- Projects utilizing funds created from the development to reimburse development costs ("pay-as-you-go") are highly encouraged. The use of public debt should be limited to only that amount absolutely necessary, which fact will be the applicant's responsibility to justify in the approval process.
- Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
- Taxes will not be reduced below the base year, as established by each Applicant.
- All projects are subject to annual appropriation from the Board of Aldermen.
- The City shall require periodic reporting evidencing compliance with the requirements of the incentive received and measure the economic benefit to the City and the region. Agreements may include specific performance requirements as a condition for granting and maintaining the abatement or incentive.
- Applicants are encouraged to consider a combination of incentives to achieve a balance that evens out the efforts of the incentives among the affected taxing jurisdictions.

General Procedural Requirements

- Applicants for any economic development incentive program granted by the City must schedule and attend a pre-application meeting with City staff prior to submitting an application.
- The City will provide basic forms, a summary of the application, review, and consideration process, applicable statutory requirements, and an estimated timeline for the approval process, in addition to other relevant information, at the pre-application meeting.
- Applicants will be expected to work with City staff and, when applicable, City consultants, while preparing the applicable "official" document to be placed on file with the City, thus triggering the applicable statutory review process.

- Applicants will be required to enter into a funding agreement whereby the applicant provides fun City for it to obtain professional consultants necessary to aid in determining the appropriate levels of assistance for the proposal, project feasibility, applicant's financial capacity, and a legal review of the application, the approval process, and the negotiation and implementation of applicable agreements. An initial deposit will be required before the City's staff and consultants will begin work processing the applicant's proposal. The amount of the funding agreement deposit will vary depending upon the application or applications filed, and applicants are hereby notified that the funding agreement will contain an "evergreen" clause whereby the applicant must replenish the fund as it is used to ensure the full amount of the deposit is available to the City for use in reviewing the application. Applicants are placed on notice that the costs associated with a funding agreement are not refundable in the event that the application is not approved. Payment of the associated costs does not guarantee approval of the application by the TIF Commission or Board of Aldermen, whose decisions shall remain at their sole discretion.
- Applicants shall consider reimbursement of the City's costs to review and consider the approval of the application, and in the event the application is approved, to administer the incentive program while it remains active, as components of the overall project costs. Applicants also shall provide a mechanism for the prompt payment of the City's costs in its application. The City's costs associated with the consideration of the approval of an application shall be paid in full at the time of any applicable hearing or meeting to consider a recommendation of approval or the approval of the application. The City reserves the right to postpone such hearing or meeting until the necessary payments have been made.

<u>Industrial Development</u>

- Chapter 100 incentives may be appropriate for development of warehouses, distribution facilities, office developments, and commercial facilities and project facilities that hold high-value personal property.
- Community Improvement Districts, Neighborhood Improvement Districts, and Transportation Development Districts may be appropriate for new industrial if the project involves development of public infrastructure.

POLICY AND PROCEDURE GUIDELINES FOR
TAX INCREMENT FINANCING (TIF) INCENTIVES

Overview

Tax Increment Financing (TIF) is a public funding mechanism to assist private development of an area within the City. TIF may only be used: 1) when there is evidence the development would not occur but-for public assistance; 2) when the project area qualifies as a blighted area in accordance with state statutes; and 3) when the project does not qualify as a greenfield as defined in the TIF Act.

TIF is a financial tool used to capture the increase in property taxes and sales taxes created as a result of the redevelopment of an approved area within the City. TIF by itself does not cause an increase in property or sales tax rates. 100% of the incremental increase in property tax revenues (known as payments in lieu of taxes or "PILOTs") and 50% of the incremental increase in local sales and use tax revenues (known as economic activity taxes or "EATs") generated in an approved TIF redevelopment area as a result of the completion of a development project will be captured and directed to a TIF special allocation fund. The PILOTs and EATs may then be used to reimburse a private developer for eligible expenses or to repay principal and interest on bonds used to finance the eligible expenses for a maximum of 23 years from the date a TIF redevelopment project was activated.

Statutory Requirements

By law, the City must determine that certain requirements have been met before approving a Tax Increment Financing Plan filed by the applicant. These requirements are set forth under Sections 99.805 to 99.865 of the Revised Statutes of the State of Missouri (RSMo.) (the "TIF Act").

Policy Guidelines

In addition to meeting the statutory requirements referenced above, the City has established several criteria that will be applied in the review and evaluation of applications for TIF financing. In general, applications that meet each of the evaluation criteria will be viewed most favorably. However, TIF applications that do not meet all of the criteria listed herein may be approved if the application demonstrates that the TIF Plan and project or projects on the whole is of vital interest to the City. The City's evaluation criteria for TIF applications are as follows:

1. The proposed development shall assist the City in achieving one or more of its economic development goals. These economic development goals are adopted and updated regularly in this Policy.
2. The proposal must demonstrate a substantial and significant public benefit by eliminating blight, financing desirable public improvements, strengthening the City's economic and employment base through the creation of new jobs or retention of existing employment, positively impacting surrounding areas, creating economic stability, facilitating economic self-sufficiency, aiding in the implementation of the City's comprehensive development plan and economic development strategies, and serving as a catalyst for further high quality development or redevelopment in the City.

3. Proposals for the redevelopment and/or infill of deteriorating areas within the City will be given consideration.
4. The applicant must provide evidence that the applicant has thoroughly explored alternative financing methods and has a track record which demonstrates the financial and technical ability to complete the project.
5. TIF assistance to the project should generally not exceed 20% of total project costs. However, project assistance above 20% may be considered in circumstances where the applicant:
    a. has a proven track record in completing successful projects comparable in scope and scale:
    b. documents the showing the applicant's financial capacity to complete the proposed project;
    c. demonstrates that tenant commitments are already in place for a significant portion of the proposed project;
    d. demonstrates the need for additional assistance in order to achieve a reasonable rate of return of the proposed project; and
    e. is seeking to develop land that is identified as highly desirable for TIF assistance.
6. Proposals requesting TIF assistance should have a ratio of three to one (3:1) in comparing potential increased revenue to the City from all sources to the value of the incentives provided, measured over the term of the TIF project.
7. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
8. Generally, TIF incentives are designed for large-scale projects, thus TIF applications which encompass a project area of less than 3 acres will be discouraged.
9. In evaluating the employment potential of a proposed redevelopment, the following shall be taken into consideration: (a) number of additional employees that will be hired as a result of the project and whether they are likely to be hired from the local population; (b) skill and education levels required for the jobs expected to be created by the project; (c) range of salary and compensation for jobs expected to be created by the project; and (d) potential for executive relocation. TIF projects that create jobs with wages that exceed the Greene County average will be viewed favorably.
10. TIF applications for retail, commercial, and entertainment projects should include development of well known, casual dining options and entertainment facilities that offer family fun and places for the community to gather. Additionally, small chain grocery stores that are not currently located within the City are highly desired.
11. TIF applications that include the development of business areas, or the redevelopment of existing business areas, shall include information as to the business type of the major tenants of the TIF area. In addition, a thorough market analysis should be completed that identifies: (1) the population areas from which the project will draw; and (2) the businesses of similar types that would be competing with the TIF area businesses.
12. TIF applications for new residential development projects (other than a limited number of residential units which are creatively integrated into commercial or retail projects) will be strongly disfavored. TIF applications for the redevelopment of existing residential areas will generally be disfavored.
13. Government-issued financing related to TIF applications:
    a. If an applicant's financing plan includes a request for the City or another governmental entity at the City's request (e.g., an industrial development authority or the Missouri Economic Development Financing Board ("MDFB")) to issue notes and/or bonds to finance the project, the applicant shall enter into an agreement with the City regarding the terms of such financing prior to the consideration of the approval of the application, which financing terms shall be incorporated into a redevelopment

agreement for the implantation of the redevelopment plan upon the approval of the applic applicable.

b. TIF applications requesting the issuance of bonds or notes shall be required to demonstrate using a third-party revenue consultant selected by the City that the payments-in-lieu of taxes and/or economic activity taxes expected to be generated will be sufficient to provide debt service coverage of at least 1.30 times the projected debt service on any tax increment financing bonds or notes, subject to input from the City's bond underwriter or other consultant on a case-by-case basis. This limitation may be modified for projects that involve the redevelopment of existing structures or the assembly and clearance of land upon which existing structures are located. The debt service coverage ratio provided in this subsection is for guidance only, the actual ratio will be determined through negotiations of the parties in the context of an actual request for incentives through an application.
c. Applications requesting the City to issue annual-appropriation backed bonds are prohibited.

14. If the TIF application is being recommended based upon specifically delineated benefits that are projected to flow to the City as a result of the development, such as increased employment opportunities, increased ad valorem or economic activity taxes, or construction of public infrastructure, language will be included in the development agreement that stipulates that the City's assistance to the applicant may be reduced if satisfactory evidence is not shown that the degree, nature and/or quality of the benefits have been generated to the City by the project in accordance with the timeline provided in the application.
15. Applications that include the utilization of a Community Improvement District (CID), Transportation Development District (TDD), Neighborhood Improvement District (NID), or other private or public financing mechanisms that result in reducing the term of the TIF project and/or reduce the burden on affected taxing jurisdictions will be viewed more favorably.
16. Notwithstanding the foregoing, TIF applications that, based upon the above guidelines, would not otherwise be favorably considered or do not meet any of the above referenced criteria, may be viewed favorably by the City if the application clearly demonstrates that the project as a whole or a portion of it is of vital interest to the City and will significantly assist the City by eliminating blight, financing desirable public improvements, strengthening the City's economic and employment base through the creation of new jobs or retention of existing employment, positively impacting surrounding areas, creating economic stability, facilitating economic self-sufficiency, aiding in the implementation of the City's comprehensive development plan and economic development strategies, and serving as a catalyst for further high quality development or redevelopment in the City.
17. The City may charge an administrative fee of up to 5% of TIF revenues to offset the cost of administration of the incentive.

Expenses Eligible for Reimbursement

Subject to the requirements of the TIF Act, expenses eligible for reimbursement under a TIF proposal may include, but are not limited to, the following:

a. Studies, surveys, plans and specifications.
b. Fees incurred by either the City or the applicant, or both, for professional services such as architectural, engineering, legal, marketing, financial, and planning.
c. Site preparation, including demolition of structures, clearing and grading of land.
d. Constructing public infrastructure such as streets, sewers, utilities, parking, and lighting.
e. Financing costs including bond issuance.
f. Relocation costs if persons or businesses within the redevelopment area are displaced.

City Application/Approval Process

The applicant is required to first meet with staff in a pre-qualification conference to determine project eligibility. An application may then be submitted to the City Administrator for review and processing. A copy of the formal application may be obtained through the City Administrator.

Provided that the application exhibits initial feasibility in the opinion of City staff as determined by the information exchanged in the pre-qualification conference, the applicant will be required to enter into a funding agreement with the City to cover the City's expenses associated with the TIF consideration and approval process, as provided in the City's General Policy and Procedural Guidelines. The City's expenses may include, but are not limited to, fees for special legal and financial consultation, market study reviews, appraisal reviews, and if applicable, bond underwriters and bond counsel. Applicants are placed on notice that the costs associated with a funding agreement are not refundable in the event that the application is not approved. Payment of the associated costs does not guarantee approval of the application by the TIF Commission or Board of Aldermen, whose decisions shall remain at their sole discretion.

Care will be exercised in the use of TIF incentives to thoroughly evaluate each project to ensure that the benefits that will accrue from the approval of the project are appropriate, in relation to the TIF incentive provided to and the costs that will result from the project, and that the project, when viewed from this prospective, benefits the City as a whole.

Each project, and the location at which it is proposed, is unique and, therefore, every proposal shall be evaluated on its individual merit, including its potential economic benefit, potential impact on the City's service levels, its overall contribution to the City's economy and its consistency with the City's goals and objective as expressed in the Comprehensive Plan and other adopted or City endorsed planning or strategic documents. The applicant is expected to work with the City's staff and consultants to prepare the TIF Plan prior to the applicant's formal submittal of the final TIF Plan for TIF Commission and Board of Aldermen review and approval.

Following a public hearing before the City's TIF Commission and approval of the TIF Plan by the Board of Aldermen, the City and the applicant shall enter into a redevelopment agreement for the purpose of governing the implementation of the TIF Plan. Such redevelopment agreement may be subject to certain terms and conditions agreed by the City and the applicant prior to the TIF Commission hearing process, which terms and conditions will be set forth in a "terms sheet".

GENERAL POLICY AND PROCEDURE GUIDELINES
FOR THE USE OF COMMUNITY IMPROVEMENT DISTRICT (CID) INCENTIVES

Overview

A Community Improvement District (CID) is a special purpose district in which property owners voluntarily impose a funding mechanism upon themselves to fund a broad range of public improvements and/or services to support business activity and economic development within specified boundaries. Created by an ordinance of the Board of Aldermen, establishment of the CID is considered after the receipt of a petition, signed by owners of real property, representing more than 50 percent of the assessed valuation within the proposed CID boundary and over 50 percent per capita of all owners of real property.

A CID may be established either as a separate political subdivision that is distinct from the municipality or as a not-for-profit corporation. If the CID is organized as a political subdivision, the District can impose a sales tax in 1/8% increments up to 1% on most retail sales and/or a real property tax. If the CID is organized as a non-profit corporation, it may only impose special assessments to finance the cost of improvements and services. The District, if desired, may issue tax-exempt revenue bonds to finance capital improvement projects for up to 20 years.

Responsibility for repayment of CID bonds, if applicable, lies solely with the District. As such, the City does not pledge its full faith and credit behind the repayment of the bonds. In terms of governance, a board of directors made up of the representatives of business owners, property owners, and voters either elected or appointed by the City of Willard Mayor and Board of Aldermen oversees District activities.

If the District is funded solely through special assessments, a not-for-profit agency can serve as the administrator. Although the CID is established with the approval of the Board of Aldermen, once formed the District operates independently in accordance with the provisions set forth in the petition and Missouri state law, including the Sunshine Law.

Statutory Requirements

By law, the City must determine that certain requirements have been met before approving the establishment of a Community Improvement District. These requirements are set forth under Sections 67.1401 - 67.1571 of the Revised Statutes of the State of Missouri (RSMo.) (the "CID Act").

Policy Guidelines

In addition to meeting the statutory requirements referenced above, the City has established several criteria that will be applied in the review and evaluation of applications for the establishment of a CID. In general, applications that meet each of the evaluation criteria will be viewed most favorably. However, CID applications that do not meet all of the criteria listed herein may be approved if the application demonstrates that the CID proposal on the whole provides a substantial and significant public benefit to meet identified economic development needs in the City. The City's evaluation criteria for CID applications are as follows:

1. The proposed development shall assist the City in achieving one or more of its economic developm[ent goals.] These economic development goals are adopted and updated regularly in this Policy.
2. CIDs which are established for the purpose of: (1) reducing the time a TIF project is active and/or offsetting the burden of TIF incentives on the affected taxing jurisdictions; or (2) providing all or a portion of the funding needed to construct and update public improvements are highly favored.
3. The applicant should work with City staff and consultants to ensure that a proposed sales tax would not cause the cumulative sales tax rate within the proposed CID boundaries to exceed ten percent (10%).
4. CIDs formed primarily for the purpose of funding common area maintenance costs are discouraged.
5. CIDs formed to finance public improvements and/or public services that will directly benefit the property owners, business owners, customers, and residents of the district are favored.
6. The CID petition shall require that at least two (2) members of the Board of Directors (or at least 40% of the Director seats) shall be an elected or appointed official or employee of the City.
7. The CID petition shall provide that the Board of Aldermen must review and approve the CID's annual budget before it is presented for approval by the CID's Board of Directors.
8. CID petitions which provide that the CID Board of Directors will be appointed by the Mayor with the consent of the Board of Aldermen are favored.
9. A CID formed by local business owners of historic and downtown areas to support additional public infrastructure and entertainment and cultural opportunities for residents and visitors is highly encouraged.
10. A CID formed to provide sustainable funding for public infrastructure would be strongly encouraged.
11. Petitions which propose the issuance of CID bonds are discouraged.
12. The use of a CID as a substitute for traditional homeowners associations is encouraged, provided that the proposed CID is established as a not-for-profit corporation.
13. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
14. The City may require an up to 1.5% administrative fee during the existence of the District.

<u>City Application/Approval Process</u>

CID applicants are required to first meet with staff pre-qualification conferences to determine project eligibility. An application may then be submitted to the City Administrator for review and processing. A copy of the formal application may be obtained through the City Administrator. Applicants will be required to enter into a funding agreement with the City pursuant to the General Policy and Procedure Guidelines provided as a component of the City of Willard's Economic Development Policies and Procedures.

Prior to the applicant's formal submittal of the final CID Petition with the City Clerk for Board of Aldermen review and approval, the applicant is expected to work with the City's staff and consultants to prepare the CID petition to ensure that it substantially complies with statutory requirements. Once the review process has been completed, the petitioner(s) may file the petition pursuant to the CID Act in the office of the City Clerk. Upon receipt of the petition, the City Clerk, upon the advice of the City Attorney or Special Counsel, or his or her designee, shall make a final determination of whether the petition substantially complies with statutory requirements. Following confirmation that the petition complies with these requirements, a public hearing will be held by the Board of Aldermen. The Board of Aldermen would then consider whether to approve an ordinance to establish the CID.

Following the establishment of the CID, the City and the CID board shall enter into a cooperative agree the purpose of establishing the terms of the relationship between the City and the CID board. Once established, the CID applicant will either seek to impose a sales tax and/or a property tax within the district, or to levy a special assessment within the district in accordance with the procedures and provisions set forth in the CID Act.

GENERAL POLICY AND PROCEDURE GUIDELINES FOR THE USE OF TRANSPORTATION DEVELOPMENT DISTRICT (TDD) INCENTIVES

Overview

Transportation Development Districts (TDD) are independent political subdivisions organized to levy sales taxes, property taxes, or special assessments to pay for the construction of roads, bridges, interchanges, intersections, parking facilities or other transportation related improvements. Unlike CIDs, TDDs are approved and organized by order of the circuit court. A TDD petition is a lawsuit filed by the petitioners against the Missouri Highways and Transportation Commission and the affected local transportation authority, which may include the City (provided that the City is not the petitioner). Property owners may petition for the creation of a district as large as several counties or as small as a single parcel of property. The TDD Act also allows for the governing body of local transportation (in the City's case, the Board of Aldermen) to file a petition to form a TDD. As long as the TDD is proposed to construct transportation related improvements, any property is eligible to be included in a TDD.

TDDs may generate revenues through sales taxes (up to 1%), ad valorem taxes on real and personal property (up to ten cents per $100 assessed valuation), special assessments, or tolls. The TDD is authorized to issue bonds on its own behalf, utilizing these captured taxes and assessments to pay debt service on bonds issued to construct transportation projects. Either the Missouri Department of Transportation (MoDOT) or the City are required to sponsor projects and must agree to accept maintenance responsibilities for completed projects. When the project costs are paid off (or if applicable, the bonds financing the project costs are paid off), the TDD is terminated.

Statutory Requirements

While City approval of a TDD is not specifically required by law, it is in an applicant's best interest to coordinate the filing of a petition for the formation of a TDD for which the City is a local transportation authority with the City before doing so. The City will aid the applicant in determining whether the requirements for a valid TDD have been met before asking the Board of Aldermen to adopt a resolution in support of the formation of the proposed TDD. These requirements are set forth under Sections 238.200 – 238.275 of the Revised Statutes of the State of Missouri (RSMo.) (the "TDD Act").

Policy Guidelines

The City may pass a resolution endorsing (or opposing) projects prior to the time of the circuit court review of petitions filed to establish a proposed TDD. Additionally, for proposed TDDs which include the City as a local transportation authority, the City has a statutory right to file a petition in support of or opposing the formation of the TDD. The City will support the formation of a TDD only in circumstances where projects create substantial public benefits by advancing the City's goals.

In addition to meeting the statutory requirements referenced above, the City has established several criteria that will be applied in the review and evaluation of applications for the formation of a TDD within the City's jurisdictional boundaries. In general, applications that meet each of the evaluation criteria will be viewed favorably. However, TDD proposals that do not meet all of the criteria listed herein may be approved if the application demonstrates that the TDD proposal on the whole provides a substantial and significant public benefit to meet identified economic development needs in the City. The City's evaluation criteria for TDD applications are as follows:

1. The proposed development shall assist the City in achieving one or more of its economic development goals. TDDs shall finance public improvements or public services that will directly benefit the property owners, business owners, customers, and residents of the district.
2. TDDs which are established for the purpose of: (1) reducing the time a TIF project is active and/or offsetting the burden of TIF incentives on the affected taxing jurisdictions; or (2) providing all or a portion of the funding needed to construct and update public improvements are highly favored.
3. TDDs formed for the purpose of financing public improvements shall terminate when the public improvement expenses have been reimbursed, unless the TDD is intended to fund ongoing maintenance.
4. The applicant should work with City staff and consultants to ensure that a proposed sales tax would not cause the cumulative sales tax rate within the proposed TDD boundaries to exceed ten percent (10%).
5. TDD petitions requiring that at least two (2) members of the TDD Board of Directors (or 40% of the Director seats) shall be an elected or appointed official or employee of the City are highly favored.
6. TDD petitions that require the Board of Aldermen to review and approve the TDD's annual budget before it is presented for approval by the TDD's Board of Directors are highly favored.
7. Petitions which propose the issuance of TDD bonds are discouraged.
8. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
9. The City may require an up to 5% administrative fee during the term of the incentive.

City Application/Approval Process

TDD applicants are required to first meet with staff for pre-qualification conferences to determine project eligibility. An application may then be submitted to the City Administrator for review and processing. A copy of the formal application may be obtained through the City Administrator. Applicants may be required to enter into a funding agreement with the City pursuant to the General Policy and Procedure Guidelines provided as a component of the City of Willard's Economic Development Policies and Procedures.

Prior to the applicant's formal submittal of the final TDD Petition with the Circuit Court Clerk, the applicant is expected to work with the City's staff and consultants to prepare the TDD petition to ensure that it complies with statutory requirements and City policy. Among the issues to be resolved in this process is whether the City will be the petitioner as the local transportation authority, or whether the property owners will file the petition. Once the review process has been completed, City staff will forward the matter to the Board of Aldermen, which will consider a resolution of support in favor of the formation of the TDD.

After the Board of Aldermen's determination, the petitioner(s) may file the petition with the Circuit Court Clerk pursuant to the TDD Act. If the Board of Aldermen has approved a resolution of support in favor of the formation of the TDD, the City will cooperate with the petitioners in the prosecution of the case, as is required by whether the City is the petitioner or a respondent. If the Board of Aldermen has not approved a resolution of

support in favor of the formation of the TDD, the City reserves its right to file an answer in oppositi
petition.

Once the TDD is formed by the circuit court, the City and the TDD board should enter into a cooperative agreement for the purpose of establishing the terms of the relationship between the City and the TDD Board of Directors.

GENERAL POLICY AND PROCEDURE GUIDELINES
FOR THE USE OF NEIGHBORHOOD IMPROVEMENT DISTRICT (NID) INCENTIVES

Overview

Unlike the CID or TDD, a Neighborhood Improvement District (NID) is not an entity separate from the City, but rather the designation of a special district in which special assessments are imposed to finance public improvements, including acquisition, construction, engineering, legal and related costs. Temporary notes are issued by the municipality to pay the costs of the improvements and related costs. Once the construction of the improvements is completed, the temporary notes are paid by the NID bonds, which are in turn retired through special assessments against property owners in the area in which the improvements are made. NID bonds cannot exceed 125% of the estimated cost of the improvements established in the NID petition. The cost of the public improvements assessed against property owners in the district are apportioned in a manner commensurate to the amount of benefit received from such improvements. NID bonds are counted against the City's constitutional debt limits.

The creation of a NID may be established by one of two methods. The first is by a favorable vote of qualified voters living within the boundaries of the proposed district. The second is through a proper petition signed by at least two-thirds of the owners of record of all real property within the proposed district. In both instances, approval by the City's Board of Aldermen is required in order to establish the NID.

Statutory Requirements

By law, the City must determine that certain requirements have been met before approving the establishment of a Neighborhood Improvement District (NID). These requirements are set forth under Sections 67.453 to 67.475 of the Revised Statutes for the State of Missouri (RSMo.) (the "NID Act").

Policy Guidelines

The City favors petitions for Neighborhood Improvement Districts (NID) that facilitate business activity, economic development, and expedited neighborhood improvement through the participation of property owners to fund public infrastructure within the City. Because the City issues special obligation bonds that count against its constitutional debt limits, decisions to approve the establishment of a NID will be determined on a case-by-case basis and approved only where there is a clear demonstration of substantial and significant public benefit. Improvements funded by a NID must be purely public in nature, meaning that the improvement will be owned, operated, and maintained by the City after completion and must remain open for public use. At a minimum, all statutory requirements must be met. The City's evaluation criteria for NID applications are as follows:

- The proposed development shall assist the City in achieving one or more of its economic development goals. These economic development goals are adopted and updated regularly in this Policy.
- NIDs shall finance public improvements or public services that will directly benefit the property owners, business owners, customers, and residents of the district.

- NIDs which are established for the purpose of: (1) reducing the time a TIF project is active and/or d[illegible]g the burden of TIF incentives on the affected taxing jurisdictions; or (2) providing all or a portion of the funding needed to construct and update public improvements are highly favored.
- Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
- The City may require an up to 5% administrative fee during the term of the incentives.

City Application/Approval Process

NID applicants are required to first meet with staff pre-qualification conferences to determine project eligibility. An application may then be submitted to the City Administrator for review and processing. A copy of the formal application may be obtained through the City Administrator. Applicants may be required to enter into a funding agreement with the City pursuant to the General Policy and Procedure Guidelines provided as a component of the City of Willard's Economic Development Policies and Procedures.

Prior to the applicant's formal submittal of the final NID Petition with the City Clerk for Board of Aldermen review and approval, the applicant is expected to work with the City's staff and consultants to prepare the NID petition to ensure that it substantially complies with statutory requirements. Once the review process has been completed, the petitioner(s) may file the petition pursuant to the NID Act in the office of the City Clerk. Upon receipt of the petition, the City Clerk, upon the advice of the City Attorney or Special Counsel, or his or her designee, shall make a final determination of whether the petition substantially complies with statutory requirements. Petitions that comply with the statutory requirements will be forwarded to the Board of Aldermen for consideration, subject to the procedural requirements established in the NID Act. Under certain conditions a cooperative agreement may be required to establish the terms of the relationship between the City and the applicants filing the NID petition.

GENERAL POLICY AND PROCEDURE GUIDELINES
FOR THE USE OF CHAPTER 100 INDUSTRIAL DEVELOPMENT INCENTIVES

Overview

Missouri law, specifically, Chapter 100 RSMo, establishes a framework by which cities may issue industrial revenue bonds to finance industrial development projects for private corporations, partnerships or individual companies. Under Chapter 100, the city issues bonds to finance real and/or personal property for eligible development projects. Eligible projects include warehouses, distribution facilities, research and development facilities, office industries, agricultural processing facilities, service facilities (which provide interstate commerce); and manufacturing plants. Based on authority in Article VI, Section 27(b) of the Missouri Constitution, Chapter 100 incentives may be utilized for any commercial project, including residential projects which are engaged the stream of commerce, such as those with tenants.

Through Chapter 100, the City also may provide "tax abatement" for land, improvements, or personal property related to the industrial development project. Whether by purchase financed through industrial revenue bonds or conveyance of a fee interest in the subject property, the City obtains ownership of the real and/or personal property and leases it back to the company under a lease-purchase agreement. In the event that the property is financed by industrial revenue bonds, the lease agreement will require the company to make rent payments that are sufficient to pay the principal and interest on the bonds as they come due. Most commonly, the bonds are purchased by the company, but can be sold on the open market. If industrial revenue bonds are not used to finance the acquisition of the property, rents are otherwise established in the lease-purchase agreement.

In the event that the property is held in the name of the City during the lease term, such property is tax exempt, thus creating "tax abatement" for the company. The company later assumes or regains ownership of the property at the end of the term of the bonds and/or lease-purchase agreement. In addition to property tax "abatement," the company also may benefit from a sales tax exemption for construction materials ("STECM") and/or equipment for the project; provided the City will own the property being constructed. If the full "abatement" of taxes is more than is necessary to make the project feasible, the City may require the company to make payments in lieu of taxes ("PILOTs") to offset the excess benefits. Chapter 100 requires PILOTs to be paid to all affected taxing jurisdictions in proportion to their ad valorem tax levies.

Statutory Requirements

The City must approve a "plan for industrial development" pursuant to Section 100.050 of the Revised Statutes for the State of Missouri (RSMo). These plans are typically drafted by the applicant, with input from the City's staff and consultants, for approval by the Board of Aldermen. All Chapter 100 Plans must include, at a minimum, a description of the project and its estimated costs, a statement of the source of funds to be expended for the project, and a statement of the terms upon which the facilities to be provided by the project will be leased or otherwise disposed by the City.

If the Chapter 100 Plan will involve the issuance of revenue bonds or the conveyance of a fee interest in real to the City, the plan must also include a statement identifying each taxing district affected by the project, the most recent equalized assessed valuation of the property included in the project and an estimate of the projected assessed valuation at the completion of the project, a cost benefit analysis for each taxing jurisdiction, and a statement identifying any PILOTs to be made.

Policy Guidelines

In addition to complying with the statutory requirements referenced above, the City has established several criteria that will be used to review and evaluate applications for Chapter 100 financing and tax abatement. To qualify for Chapter 100 tax abatement, each of the following should be satisfied:

1. The proposed development shall assist the City in achieving one or more of its economic development goals. These economic development goals are adopted and updated regularly in this Policy.
2. Show a clear demonstration of public purpose and economic benefit through the advancement of the City's economic development goals.
3. Demonstrate the project would not occur "but for" the incentives offered. The incentive should make a difference in determining the decision of the business to locate, expand, or remain in the City; and would not otherwise occur without the availability of the abatement.
4. Include evidence provided by the business that demonstrates the company's financial stability and capacity to complete the project. The City may utilize a financial advisor of its choosing to assist in this determination.
5. Ensure the City, County, Willard Public Schools, or any other taxing jurisdiction affected by the incentive would not receive less total real and personal property tax revenue from the property than was received prior to the granting of tax abatement.
6. Comply with the City's Comprehensive Plan.
7. Chapter 100 Plans that allow for a payment bond, rather than a mechanic's lien, are favored.
8. Be environmentally compatible with the specific location and the surrounding area. Preference will be given to businesses that do their own pre-treatment or do not require extensive environmental controls.
9. Comply with the statutory requirements set forth in Sections 100.010 to 100.200 RSMo. Applications that do not meet all of these criteria may be approved if the application clearly demonstrates that the project, as a whole, is of vital economic interest to the City
10. If applicable, PILOTs will be due December 31 of each year. Failure to pay PILOTs will result in termination of the incentives.
11. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
12. The City may impose an up to 5% administrative fee during the term of the incentives.

City Application/Approval Process

The applicant is required to first meet with City staff and/or consultants in a pre-qualification conference to determine project eligibility. An application may then be submitted to the City Administrator for review and processing. A copy of the formal application may be obtained through the City Administrator. Applicants will be required to enter into a funding agreement with the City pursuant to the General Policy and Procedure Guidelines in this Policy.

If the project meets the policy guidelines outlined above, the company will be invited to submit a plan for i development ("Chapter 100 Plan") as outlined under Section 100.050, RSMo. The Chapter 100 Plan will then be considered for formal approval by the Willard Board of Aldermen.

Following approval of the Chapter 100 Plan, the City and the applicant shall enter into a Chapter 100 development agreement and a lease-purchase agreement which will govern the terms of the abatement. The development agreement shall require that an annual report be submitted to the City annually during project construction. The report shall cover the previous year and include a detailed accounting of the project. Reporting timeframes may be adjusted as appropriate for the project. The agreement may include a claw-back provision requiring specified performance on issues such as new jobs created as a condition for granting and maintaining the abatement.

GENERAL POLICY AND PROCEDURE GUIDELINES
FOR THE USE OF CHAPTER 353 URBAN REDEVELOPMENT INCENTIVES

Overview

Chapter 353, RSMo, encourages the redevelopment of blighted areas through the abatement of real property taxes. To be eligible for tax abatement, either the City or a private entity must form an Urban Redevelopment Corporation ("URC") pursuant to the Urban Redevelopment Corporations Law. In order to establish an URC, articles of association must be prepared in accordance with the general corporations law of Missouri.

Chapter 353 authorizes tax abatement on real property taxes for a period up to 25 years. For up to the first 10 years, the statute provides for 100% abatement on the increased assessed value of the improvements on the property (excluding land). For a period of up to an additional 15 years, Chapter 353 allows for abatement of 50% to 100% on the actual assessed value of the property (land and improvements). Payments in lieu of taxes may be required by the City to reduce the amount of the abatement authorized by statute and to ensure no loss of existing property tax revenues by taxing jurisdictions such as the City and school district. Tax abatement is not available for personal property taxes on equipment or machinery.

Statutory Requirements

By law, the City must determine that certain requirements have been met before approving a development plan ("353 Plan") filed by the Urban Redevelopment Corporation (URC). These requirements are set forth under 353.020 to 353.150 of the Revised Statutes for the State of Missouri (RSMo.).

General Abatement Procedures

1. The proposed development shall assist the City in achieving one or more of its economic development goals. These economic development goals are adopted and updated regularly in a separate document to be provided by City staff.

2. Development Plan: Urban redevelopment corporations have the power to operate one or more redevelopment projects pursuant to a development plan which has been authorized by the City after holding a public hearing. The City may assist in the preparation of a development plan. The City must make a finding of blight regarding the area included within the development plan. This finding will be based on a blight study provided by the applicant and approved by City staff and consultants.

   Each project shall prepare a project plan that will implement the development plan approved for the redevelopment area. Preparation of each project plan within a redevelopment district shall be the responsibility of the applicant/property owner and require its own public hearing and is included as an amendment to the development plan. Each individual project within a larger district covered by a development plan may not need to make a blight finding each time a project is considered.

3. Tax Impact Analysis: Chapter 353 requires the governing body to hold a public hearing regar proposed development plan. Before the public hearing, the governing body must furnish to the political entities whose boundaries include any portion of the property to be affected by tax abatement notice of the scheduled public hearing and a written statement of the impact on ad valorem taxes such tax abatement will have on the taxing entities. When establishing a district with several properties, a tax impact analysis will be prepared at the time the specific project is considered by the Board of Aldermen.

4. Development Agreement: The development agreement, between the City, the property owner and the URC, describes the obligations to carry out the development plan. Among the provisions that are included in the development agreement are procedures for acquiring property, the tax abatement period, the schedule for construction, and procedures for the transfer of title to the property. The agreement shall require that an annual report be submitted to the City annually during each year the abatement is in place. The report shall cover the time period of the previous year and include a detailed accounting and status of the project.

5. Abatement Program: Once a project has been approved, and the redevelopment corporation has taken title to real property, that real property shall not be subject to assessment or payment of general ad valorem as provided in the Plan and consistent with Chapter 353.

   The City may, as included within a project's development agreement allow abatement at a rate and for an additional number of years provided in the Plan and consistent with Chapter 353. The Board of Aldermen shall determine the length of time for this period of abatement based upon the amount of investment and adherence to the Policy Guidelines.

Policy Guidelines

In accordance with Missouri law, the City of Willard will consider the granting of Chapter 353 abatement incentives where the property has been found to be a "blighted area." In addition to this statutory requirement, each of the following criteria should be satisfied:

1. The proposed development shall assist the City in achieving one or more of its economic development goals. These economic development goals are adopted and updated regularly in this Policy. The City encourages the use of a 353 program that would assist property owners in historic or downtown areas in remediating blight, and, if the use meets statutory requirements, to offset a sales tax imposed under a CID.
2. Show a clear demonstration of public purpose and economic benefit through the advancement of the City's economic development goals.
3. Demonstrate the project would not occur "but for" the incentives offered. The incentive should make a difference in determining the decision of the business to locate, expand or remain in the City and would not otherwise occur without the availability of the abatement.
4. Include evidence provided by the business that demonstrates the company's financial stability and capacity to complete the project.
5. Ensure that the City, Greene County, Willard Public Schools, or any other taxing jurisdiction affected by the incentive would not receive less total real property tax revenue from the property than was received prior to the granting of the tax abatement.
6. Be compatible with the specific location and the surrounding area. The proposed use must be clean, nonpolluting and consistent with all development ordinances and codes. The applicant is responsible for conducting all necessary environmental audits and taking any and all remedial action necessary as required by the City or any other governmental entity.

7. Properties receiving tax abatement must be maintained in compliance with minimum standards, c ordinances of the City.
8. The improvements included within the request for abatement for rehabilitation projects shall be at least 50% exterior improvements so as to be visible to the public.
9. Comply with the statutory requirements set forth in Sections 353.020 - 353.150 RSMo.
10. Payments in lieu of taxes (PILOTs) may be imposed by the City and paid by the property owner if deemed appropriate for the project. PILOTs are paid on an annual basis to replace all or part of the real estate taxes, which are abated. PILOTs shall be made to the County Collector by December 31st of each year. The City Clerk shall furnish the Collector with a copy of the agreement by which the PILOTs are imposed. The PILOTs must be allocated to each taxing district according to their proportionate share of ad valorem property taxes. 353.110.4, RSMo.
11. Upon determination that the provisions within the development plan are not being satisfied (i.e. use, operate, maintain), the City may proceed with revocation of tax abatement.
12. Subject to the statutory requirements of Chapter 353, applications for Chapter 353 partial real property tax abatement may be approved where not all of the above criteria are met if the application clearly demonstrates that the project, as a whole, is of vital economic interest to the City. Because the approval of such partial real property tax abatement is granted within the discretion of the Board of Aldermen, an application's satisfaction of the above criteria does not guarantee that Board of Aldermen approval will be granted. Projects that produce other forms of additional revenue (e.g., an increase in City's sales tax revenue) may be considered for a longer tax abatement period upon Board of Aldermen approval.
13. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
14. The City may require an up to 5% administrative fee during the term of the incentives.

<u>City Application/Approval Process</u>

The applicant is required to first meet with staff in a pre-qualification conference to determine project eligibility. Applications for the City's 353 program will be accepted by the City staff on behalf of the Urban Redevelopment Corporation. An application may then be submitted to the office of the City Administrator for review and processing. A copy of the formal application form may be obtained from the office of the City Administrator.

If the project meets the policy guidelines outlined above, the URC will be invited to submit a redevelopment plan covering the area proposed for redevelopment. The redevelopment plan, which shall include a blight study, will then be considered for formal approval by the Willard Board of Aldermen after a required public hearing.

Following approval of the redevelopment plan, the City and the URC shall enter into a performance agreement which will govern the terms of the abatement. The agreement shall require that an annual report be submitted to the City annually during each year of the incentive. The report shall cover the time period of the previous year and include a detailed accounting of the project. The agreement may include a claw-back provision requiring specified performance on issues such as new jobs created as a condition for granting and maintaining the abatement.

GENERAL POLICY AND PROCEDURE GUIDELINES
FOR THE USE OF SALES TAX REIMBURSEMENT INCENTIVES

Overview

Sales Tax Reimbursement agreements are a funding mechanism allowed by Missouri law that may be used to achieve a public benefit through funding public infrastructure. Under such an agreement, municipalities have the ability to annually appropriate the increase in taxes created by new private capital investment to offset a portion of their project investment costs. The tax increment must be used for a public purpose, primarily through the funding of public improvements and subject to statutory limitations on uses of revenue. Under such an agreement, a portion of City taxes captured from the increased revenues generated by the project would be reimbursed to the applicant for eligible expenses.

Statutory Requirements

Under Section 70.220 of the Revised Statutes of the State of Missouri (RSMo.), municipalities are authorized to contract and cooperate with private firms or corporations for the planning, development, construction, acquisition or operation of public improvements.

Policy Guidelines

For use of sales tax reimbursement agreements, the following criteria should be satisfied:

1. The proposed development shall assist the City in achieving one or more of its economic development goals.
2. Demonstrate that the project would prevent a significant loss in existing tax revenue or make a significant contribution to the overall health and well-being of the local economy.
3. Sales tax reimbursement agreements may utilize up to 50% of the City's 1% general sales tax, subject to statutory requirements for the use of public funds. Applicants acknowledge that the City's sales taxes that are allocated to a dedicated purpose (such as public safety, capital improvements, etc.) may not be available for use in a sales tax reimbursement agreement.
4. Applicants may be required to obtain performance, maintenance, or payment bonds and comply with prevailing wage and other public works contracting requirements if public improvement work is completed on existing City infrastructure.
5. Show a clear demonstration of public purpose and economic benefit through the advancement of the City's economic development goals.
6. Demonstrate that the project would not occur "but for" the incentives offered. The incentive should make a difference in determining the decision of the business to expand or remain in the City and would not otherwise occur without the availability of the tax reimbursement.
7. Include evidence provided by the company that demonstrates the business's financial stability and capacity to complete the project.
8. Ensure the City is not receiving less total tax revenue from the property than was received prior to the granting of the sales tax reimbursement.

9. Generally ensure the term of the reimbursement should not extend beyond 10 years from approval.
10. Proposals to develop non-greenfield areas that are undeveloped shall be viewed more favorably than proposals for projects in developing areas. In other words, pioneering applicants may be rewarded more than applicants who seek to develop in an area where new economic activity has already begun.
11. The City may impose an up to 5% administrative fee during the term of the incentives.
12. The agreement shall require annual reporting to the City relating to agreement obligations and the agreement shall require termination of those obligations are not met. The agreement may include a claw-back provision requiring specified performance on issues such as new jobs created as a condition for granting and maintaining the reimbursement.

City Application/Approval Process

The applicant is required to first meet with staff in a pre-qualification conference to determine project eligibility. A copy of the formal application form may be obtained from, and submitted to, the office of the City Administrator. Upon consent from the Board of Aldermen, the City and an applicant will enter into a tax reimbursement agreement.

Missouri Works Program

The Missouri Works Program facilitates the creation of quality jobs by targeted business projects which create a minimum number of jobs at the project facility.

Small Business Loan Program

The Small Business Loan Program makes available direct loans for small businesses at low-interest or no-interest in corporation with the Missouri Development Finance Board.

Missouri Housing Development Commission

The Missouri Housing Development Commission administers the federal Low Income Housing Tax Credit (LIHTC) programs and the Missouri Housing Trust Fund (MHTF) which assist in the construction, renovation, and preservation of affordable housing in the State.

BILL NO. 26-25 **ORDINANCE NO. 260707A**

AN ORDINANCE OF THE CITY OF WILLARD, MISSOURI, ADOPTING THE CITY OF WILLARD ECONOMIC DEVELOPMENT INCENTIVE POLICY.

WHEREAS, the Board of Alders finds that responsible economic development is essential to maintaining and improving the quality of life, public infrastructure, employment opportunities, and long-term fiscal sustainability of the City of Willard; and

WHEREAS, the Board further finds that the strategic and prudent use of economic development incentives may, under appropriate circumstances, encourage private investment, business retention, business expansion, redevelopment, infrastructure improvements, and commercial growth that might not otherwise occur; and

WHEREAS, the Board desires to establish a transparent, consistent, and objective framework for evaluating requests for economic development incentives that promotes accountability, protects the public interest, ensures responsible stewardship of public resources, and provides clear expectations for applicants seeking such incentives; and

WHEREAS, the Board further finds that economic development incentives should be awarded only after careful consideration of the public benefits to be achieved, the financial feasibility of the proposed project, and the City's adopted economic development priorities, while recognizing that each request must be evaluated on its own individual merits; and

WHEREAS, the Board desires to formally adopt the City of Willard Economic Development Incentive Policy to establish the City's goals, priorities, standards, procedures, and evaluation criteria governing future requests for economic development incentives.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERS OF THE CITY OF WILLARD, MISSOURI, AS FOLLOWS:

Section 1. Adoption.

The document entitled "City of Willard Economic Development Incentive Policy," dated July 6th, 2026, and approved by the Board of Alders, is hereby adopted as the official policy governing the City's consideration, evaluation, negotiation, administration, and oversight of economic development incentive requests.

Section 2. Incorporation by Reference.

The City of Willard Economic Development Incentive Policy is hereby incorporated into this Ordinance by reference as though fully set forth herein. The policy shall have the same force and effect as if fully recited in this Ordinance. A copy of the adopted policy shall be maintained by the City Clerk and made available for public inspection in accordance with applicable law.

Section 3. Administration.

The City Administrator, City Clerk, and other appropriate City officials are authorized and directed to administer and implement the provisions of the Economic Development Incentive Policy in accordance with its terms.

Section 4. Nature of Policy.

The Economic Development Incentive Policy is intended to serve as a guide for the consideration of requests for economic development incentives and to promote consistency, transparency, and accountability in the City's decision-making process. Nothing contained in this Ordinance or the incorporated Policy shall be construed to create any entitlement, contractual right, vested interest, or obligation requiring the City to approve any application or grant any economic development incentive. The Board of Alders expressly reserves its legislative discretion to approve, deny, modify, or condition any request for incentives as permitted by law.

Section 5. Amendments.

The Economic Development Incentive Policy may be amended from time to time by the Board of Alders, unless otherwise required by law. Any amendment adopted by the Board shall automatically become part of the policy incorporated by reference herein.

Section 6. Severability.

If any section, subsection, sentence, clause, phrase, or provision of this Ordinance is for any reason held to be invalid or unconstitutional, such decision shall not affect the validity of the remaining portions of this Ordinance, which shall continue in full force and effect.

Section 7. Effective Date.

This Ordinance shall take effect and be in full force from and after its passage and approval as provided by law.

Read, this first time on this ___________ day of ___________, 2026.

Read, this second time, passed, and truly agreed to by the Board of Aldermen of the City of Willard, Missouri this ___________day of ___________, 2026.

____

Mayor

ATTEST:

City Clerk

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Wes Young

SUBJECT:

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE WATER SUPERVISOR POSITION

Budgetary Impact – Position Split and Appointment/Promotion to Water Supervisor (Kevin Sebourn)

*The previous combined Water & Sewer Supervisor position is currently vacant. That position was previously paid at $26.92/hr. This proposal reflects splitting the combined position into separate Water Supervisor and Sewer Supervisor roles, with Kevin Sebourn assigned to the Water Supervisor role. The wage options below evaluate possible hourly rates for Ray based on the water-specific supervisory duties assigned.

Current vs Proposed Pay

- **Current hourly rate: $25.20**
- **Option 1: $26.92**
- **Option 2: $27.00**

Annual Cost Impact (No Change in Benefits)
Assuming a full-time schedule (2,080 hours/year):

Option 1 – Increase to $26.92
Hourly increase: +$1.72
Annual impact:
$1.72 × 2,080 = $3,577.60

Option 2 – Increase to $27.00
Hourly increase: +$1.80
Annual impact:
$1.80 × 2,080 = $3,744.00

Key Consideration: No Additional Benefit Costs
Because there are **no additional benefits associated with this wage adjustment**, the financial impact is limited strictly to wages.

- No increase in employer-paid insurance, retirement, or payroll burden.
- No change to total compensation structure beyond hourly pay.
- Makes the water supervisor wage adjustment more financially predictable and easier to absorb in the operating budget.

Budget Impact Summary

Scenario	Hourly Increase	Annual Cost Increase
Promote to $26.92	**+$1.72**	**$3,577.60**
Promote to $27.00	**+$1.80**	**$3,744.00**

Justification

The proposed wage adjustment for Kevin would apply only if the City chooses to split the current Water/Sewer Supervisor position into two separate supervisory roles, similar to the prior Ray split, and Kevin is assigned as the Water Supervisor. This adjustment would recognize the added supervisory responsibility associated with overseeing water operations, supporting daily work coordination, and helping ensure continuity in the City's water system operations. The annual budget impact ranges from $3,577.60 to $3,744.00 depending on the final rate selected. As no additional benefits are associated with this change, the cost impact is limited to wages only. This makes the adjustment a controlled and predictable increase while supporting department structure, operational continuity, and leadership coverage within the water utility function.

BILL NO. 26-26 **ORDINANCE NO. 260707B**

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE WATER SUPERVISOR POSITION

WHEREAS, the City previously maintained a combined Water and Sewer Supervisor position; and

WHEREAS, the City has determined that separating the supervisory responsibilities into distinct Water Supervisor and Sewer Supervisor positions better serves the operational needs of the Public Works Department; and

WHEREAS, Mr. Kevin Sebourn has been selected to serve as Water Supervisor; and

WHEREAS, the City's Personnel Policy authorizes the City Administrator to approve employee compensation adjustments up to two and one-half percent (2.5%) of an employee's current rate of pay; and

WHEREAS, the proposed compensation adjustment for Mr. Sebourn exceeds the City Administrator's delegated approval authority and therefore requires approval by the Board of Aldermen; and

WHEREAS, the Board has reviewed the budgetary impact associated with the proposed compensation adjustment and finds the adjustment to be in the best interests of the City.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, AS FOLLOWS:

Section 1. Assignment.

The Board acknowledges the assignment of Kevin Sebourn to serve as Water Supervisor, subject to the administrative direction of the City Administrator.

Section 2. Compensation.

Effective _________________________, the hourly wage for Kevin Sebourn shall be established at:

☐ **Option 1: $26.92 per hour**

☐ **Option 2: $27.00 per hour**

or such option as approved by the Board during consideration of this Resolution.

Section 3. Budget Authority.

The City Administrator and Chief Financial Officer are authorized to implement the compensation adjustment approved herein and to make any necessary payroll and budgetary changes consistent with this Resolution.

Section 4. Effective Date.

Read, this first time on this ________ day of _____________, 2026.

Read, this second time, passed, and truly agreed to by the Board of Aldermen of the City of Willard, Missouri this ______________day of _____________, 2026.

____
Mayor

ATTEST:

____
City Clerk

Item # 7C.

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Wes Young

SUBJECT:

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE SEWER SUPERVISOR POSITION

Budgetary Impact – Position Split and Appointment/Promotion to Sewer Supervisor (Ray Lynch)

*The previous combined Water & Sewer Supervisor position is currently vacant. That position was previously paid at $26.92/hr. This proposal reflects splitting the combined position into separate Water Supervisor and Sewer Supervisor roles, with Ray Lynch assigned to the Sewer Supervisor role. The wage options below evaluate possible hourly rates for Ray based on the sewer-specific supervisory duties assigned.

Current vs Proposed Pay

- **Current hourly rate: $22.00**
- **Option 1: $25.00**
- **Option 2: $26.92**
- **Option 3: $27.00**

Annual Cost Impact for Sewer Supervisor Assignment (No Change in Benefits)
Assuming a full-time schedule (2,080 hours/year):

Option 1 – Increase to $25.00
- **Hourly increase: +$3.00**
- **Annual impact:**
  $3.00 × 2,080 = $6,240

Option 2 – Increase to $26.92
- **Hourly increase: +$4.92**
- **Annual impact:**
  $4.92 × 2,080 = $10,233.60

Option 3 – Increase to $27.00
- **Hourly increase: +$5.00**
- **Annual impact:**
  $5.00 × 2,080 = $10,400

Key Consideration: No Additional Benefit Costs
Because there are **no additional benefits associated with this assignment**, the financial impact shown is limited strictly to wages for Ray's Sewer Supervisor role.

- No increase in employer-paid insurance, retirement, or payroll burden.
- No change to total compensation structure beyond hourly pay.
- Makes the sewer supervisor wage adjustment more financially predictable and easier to absorb in the operating budget.

Budget Impact Summary

Scenario	Hourly Increase	Annual Cost Increase
Sewer Supervisor to $25.00	+$3.00	$6,240
Sewer Supervisor to $26.92	+$4.92	$10,233.60
Sewer Supervisor to $27.00	+$5.00	$10,400

Justification

The proposed wage adjustment for Ray reflects the City’s decision to split the previously combined Water & Sewer Supervisor position into separate functional supervisor roles. Ray would assume responsibility as Sewer Supervisor, with direct oversight of sewer operations, related staff direction, compliance support, maintenance coordination, and day-to-day operational continuity. Because this change assigns Ray a defined supervisory role rather than the full combined Water & Sewer Supervisor position, the selected hourly rate should reflect the scope of sewer-specific responsibilities, internal equity, and the prior combined supervisor rate. The annual budget impact ranges from \$6,240 to \$10,400 depending on the final rate selected. As no additional benefits are associated with this change, the cost impact is limited to wages only and applies only to Ray’s Sewer Supervisor assignment. Any separate wage impact for a Water Supervisor role would need to be evaluated independently.

BILL NO. 26-27 **ORDINANCE NO. 260707C**

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE SEWER SUPERVISOR POSITION

WHEREAS, the City previously maintained a combined Water and Sewer Supervisor position; and

WHEREAS, the City has determined that separating the supervisory responsibilities into distinct Water Supervisor and Sewer Supervisor positions better serves the operational needs of the Public Works Department; and

WHEREAS, Mr. Ray Lynch has been selected to serve as Sewer Supervisor; and

WHEREAS, the City's Personnel Policy authorizes the City Administrator to approve employee compensation adjustments up to two and one-half percent (2.5%) of an employee's current rate of pay; and

WHEREAS, the proposed compensation adjustment for Mr. Lynch exceeds the City Administrator's delegated approval authority and therefore requires approval by the Board of Aldermen; and

WHEREAS, the Board has reviewed the budgetary impact associated with the proposed compensation adjustment and finds the adjustment to be in the best interests of the City.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, AS FOLLOWS:

Section 1. Appointment/Assignment.

The Board acknowledges the assignment of Ray Lynch to serve as Sewer Supervisor, subject to the administrative direction of the City Administrator.

Section 2. Compensation.

Effective ________________________, the hourly wage for Ray Lynch shall be established at:

☐ **Option 1: $25.00 per hour**

☐ **Option 2: $26.92 per hour**

☐ **Option 3: $27.00 per hour**

or such option as approved by the Board during consideration of this Resolution.

Section 3. Budget Authority.

The City Administrator and Chief Financial Officer are authorized to implement the compensation adjustment approved herein and to make any necessary payroll and budgetary changes consistent with this Resolution.

Section 4. Effective Date.

This Resolution shall become effective immediately upon its adoption.

Read, this first time on this ___________ day of ___________, 2026.

Read, this second time, passed, and truly agreed to by the Board of Aldermen of the City of Willard, Missouri this ___________day of ___________, 2026.

____

Mayor

ATTEST:

____

City Clerk

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Wes Young

SUBJECT:

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE STREETS SUPERVISOR POSITION

Budgetary Impact – Merit Raise for Matt Huddle

Current vs Proposed Pay

- **Current hourly rate: $23.59**
- **Option 1: $25.00**
- **Option 2: $26.92**
- **Option 3: $27.00**

Annual Cost Impact (No Change in Benefits)
Assuming a full-time schedule (2,080 hours/year):

Option 1 – Increase to $25.00	Option 2 – Increase to $26.92	Option 3 – Increase to $27.00
Hourly increase: +$1.41	Hourly increase: +$3.33	Hourly increase: +$3.41
Annual impact:	Annual impact:	Annual impact:
$1.41 × 2,080 = $2,932.80	$3.33 × 2,080 = $6,926.40	$3.41 × 2,080 = $7,092.80

Key Consideration: No Additional Benefit Costs
Because there are **no additional benefits associated with this promotion**, the financial impact is limited strictly to wages.

- No increase in employer-paid insurance, retirement, or payroll burden.
- No change to total compensation structure beyond hourly pay.
- Makes the promotion more financially predictable and easier to absorb in the operating budget.

Budget Impact Summary

Scenario	Hourly Increase	Annual Cost Increase
Promote to $25.00	+$1.41	$2,932.80
Promote to $26.92	+$3.33	$6,926.40
Promote to $27.00	+$3.41	$7,092.80

Justification Language

The proposed wage adjustment for Matt reflects an increase for the Streets Supervisor position in recognition of the responsibilities associated with supervising street operations, coordinating daily work activities, and supporting the ongoing maintenance needs of the City's street infrastructure. The annual budget impact ranges from $2,932.80 to $7,092.80 depending on the final rate selected. As no additional benefits are associated with this change, the cost impact is limited to wages only. This makes the adjustment a controlled and predictable increase while supporting department leadership, operational continuity, and retention in a key supervisory role.

BILL NO. 26-28 **ORDINANCE 260707D**

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A COMPENSATION ADJUSTMENT FOR THE STREETS SUPERVISOR POSITION

WHEREAS, Matt Huddle serves the City in the position of Streets Supervisor; and

WHEREAS, the City has determined that a compensation adjustment is appropriate in recognition of Mr. Huddle's responsibilities in supervising street operations, coordinating daily work activities, supporting the maintenance of the City's street infrastructure, and promoting employee retention; and

WHEREAS, the City's Personnel Policy authorizes the City Administrator to approve employee compensation adjustments up to two and one-half percent (2.5%) of an employee's current rate of pay; and

WHEREAS, the proposed compensation adjustment for Mr. Huddle exceeds the City Administrator's delegated approval authority and therefore requires approval by the Board of Aldermen; and

WHEREAS, the Board has reviewed the budgetary impact associated with the proposed compensation adjustment and finds the adjustment to be in the best interests of the City.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, AS FOLLOWS:

Section 1. Compensation.

Effective ________________________, the hourly wage for Matt Huddle shall be established at:

☐ **Option 1: $25.00 per hour**

☐ **Option 2: $26.92 per hour**

☐ **Option 3: $27.00 per hour**

or such option as approved by the Board during consideration of this Resolution.

Section 2. Budget Authority.

The City Administrator and Chief Financial Officer are authorized to implement the compensation adjustment approved herein and to make any necessary payroll and budgetary changes consistent with this Resolution.

Section 3. Effective Date.

This Resolution shall become effective immediately upon its adoption.

Read, this first time on this ___________ day of ___________, 2026.

Read, this second time, passed, and truly agreed to by the Board of Aldermen of the City of Willard, Missouri this ___________day of ___________, 2026.

____

Mayor

ATTEST:

____

City Clerk

BOARD OF ALDERS MEETING

TO: The Board of Alders

FROM: Wes Young

SUBJECT:

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A POSITION TITLE CHANGE AND COMPENSATION ADJUSTMENT FOR EMILY MILLS

Budgetary Impact – Title Change for Emily

Position Change

Current Title: Activities Coordinator

Proposed Title: Activities & Marketing Coordinator
The proposed title change reflects the addition of marketing responsibilities, including promotion of programs and events, social media management, community outreach, advertising coordination, and support of occupancy and engagement goals.

Current vs Proposed Pay
- **Current hourly rate:** $19.85
- **Proposed hourly rate:** $21.85

Wage Increase
- Hourly increase: **$2.00**

Annual Cost Impact
Assuming a full-time schedule of 2,080 hours per year:
- **$2.00 × 2,080 hours = $4,160 annually**

Summary

Current Rate	Proposed Rate	Hourly Increase	Percent	Annual Cost Increase
$19.85	$21.85	$2.00	10.08	**$4,160**

Benefit Impact
No additional benefits are associated with this title and wage adjustment. Therefore, the budgetary impact is limited to the increase in wages.

Justification
The proposed title change from **Activities Coordinator** to **Activities & Marketing Coordinator** recognizes the expanded scope of Emily's role. In addition to coordinating resident activities and events, the position now includes marketing-related responsibilities that support community engagement, event promotion, public awareness, and organizational outreach.
The proposed wage adjustment from **$19.85 to $21.85 per hour** reflects these added responsibilities and results in an annual budget impact of **$4,160**. As no additional benefits will be incurred, the increase represents a controlled and predictable investment in a position that contributes to both resident programming and marketing efforts.

BILL NO. 26-29 **ORDINANCE 260707E**

AN ORDINANCE OF THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, APPROVING A POSITION TITLE CHANGE AND COMPENSATION ADJUSTMENT FOR EMILY MILLS

WHEREAS, Emily Mills currently serves the City in the position of Activities Coordinator; and

WHEREAS, the City has expanded the responsibilities of the position to include marketing-related duties, including the promotion of City programs and events, social media management, community outreach, advertising coordination, and support of community engagement initiatives; and

WHEREAS, in recognition of these additional responsibilities, the City has determined that the position title should be changed from **Activities Coordinator** to **Activities & Marketing Coordinator**; and

WHEREAS, the City's Personnel Policy authorizes the City Administrator to approve employee compensation adjustments up to two and one-half percent (2.5%) of an employee's current rate of pay; and

WHEREAS, the proposed compensation adjustment for Emily Mills exceeds the City Administrator's delegated approval authority and therefore requires approval by the Board of Aldermen; and

WHEREAS, the Board has reviewed the proposed title change, compensation adjustment, and associated budgetary impact and finds them to be in the best interests of the City.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF WILLARD, MISSOURI, AS FOLLOWS:

Section 1. Position Title.

Effective ________________________, the position title of **Activities Coordinator** held by Emily Mills shall be changed to **Activities & Marketing Coordinator**.

Section 2. Compensation.

Effective the same date, the hourly wage for Emily Mills shall be established at **$21.85 per hour**.

Section 3. Budget Authority.

The City Administrator and Chief Financial Officer are authorized to implement the approved title change, compensation adjustment, and any necessary payroll or personnel record updates consistent with this Resolution.

Section 4. Effective Date.

This Resolution shall become effective immediately upon its adoption.

Read, this first time on this ___________ day of ___________, 2026.

Read, this second time, passed, and truly agreed to by the Board of Aldermen of the City of Willard, Missouri this ___________day of ___________, 2026.

____

Mayor

ATTEST:

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City Clerk