

**CITY OF APPLETON 2021 BUDGET**

**COMMUNITY & ECONOMIC DEVELOPMENT**

**Director Community & Economic Development: Karen E. Harkness**

**Deputy Director Community & Economic Development: Monica N. Stage**

# CITY OF APPLETON 2021 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

## MISSION STATEMENT

The Community and Economic Development Department proactively fosters a healthy economy and a strong, welcoming community.

## DISCUSSION OF SIGNIFICANT 2020 EVENTS

\* Supporting the business and not-for-profit community during COVID-19 has been a priority. The department continues to work and communicate with the business community with efforts including social media, regular business retention visits, and partnerships with community organizations that help build relationships that benefit the City.

\* Industrial development saw a continued increase in 2020. New Morning Coffee Roasters completed construction of their new 20,000 square foot building in Southpoint Commerce Park. Custom Offsets completed construction of their new 20,000 square foot office building. Hayden Properties continues due diligence for approximately 50 acres under contract to purchase in Southpoint. Closing on Phase I (approx. 12.5 acres) is scheduled for September, 2020. CEDD staff also assisted DPW in acquiring the property at 3001 E. Glendale Avenue in the Northeast Business Park.

\* Downtown Appleton saw the construction of several new residential and mixed-use residential developments, furthering the City's goal of creating over 465 new residential units in the downtown per the City's Comprehensive Plan 2010-2030. The Gabriel Lofts, Avant, and Crescent Lofts projects used new construction, redevelopment and historic renovation to create a total of 122 new residential units, with 58 of those units at affordable rental rates per the WHEDA tax credit program. Staff continued collaboration with US Venture to construct their headquarters on the Bluff Site. Staff also continues to work with Milwaukee View on their redevelopment of the historic Zuelke Building, Tadych Investment on their mixed-use project at 320 E. College Avenue, Block 800 LLC on the redevelopment of 823-827 W. College Avenue for mixed-use, and several additional projects in various phases.

\* A Development Planning Option was completed with Merge Urban Development for the former Conway Hotel and former Blue Ramp sites. Due diligence is underway to evaluate a potential mixed-use development on those properties.

\* Business enhancement grants from TIF District #11 and TIF District #12 have been almost fully utilized as of July, 2020 with \$5,550 remaining in TIF #11 and \$2,825 remaining in TIF #12. These funds leveraged another \$253,010 in private investment in the downtown. Additionally, the Appleton Redevelopment Authority (ARA) allocated \$80,000 to a new Business Enhancement Grant Program to assist commercial property owners and tenants with façade and exterior improvements outside of the TIF #11 and TIF #12 program boundaries.

\* Staff collaborated with the City Attorney's Office and Inspection Division to update zoning ordinance standards to be consistent with the changes to Wisconsin's Local Land Use Enabling Laws (Zoning Board of Appeals and Variances, City Plan Commission and Common Council decisions on Special Use Permits, Nonconforming Manufactured Home regulations, revised and create new definition terms as needed), added new regulations for wineries, brewpubs, and distilleries consistent with industry standards and Wisconsin State Statutes, created new zero lot line duplex development standards, administrative parking variances, and site plan updates, removed self-storage from the C-2 district, amended C-1 zoning district to create a new and flexible mixed-use zoning district, and a number of other minor revisions to eliminate inconsistent, vague or confusing language to enhance "user friendliness" and "consistent administration/enforcement" of Zoning Ordinance. The Common Council approved these Zoning Ordinance text amendments, and they went into effect March 24, 2020.

\* Implementation of the Comprehensive Plan continued in 2020, with highlights that include redevelopment on the west and north ends of downtown, numerous amendments to the zoning ordinance, increased commercial development along the Richmond Street corridor, annexations and right-of-way dedications to facilitate new growth, and continued riverfront redevelopment.

\* During the second half of 2019 and the first half of 2020, the site plan review team has approved approximately 122 dwelling units, 28,200 square feet of industrial space, 67,500 square feet of office/commercial space, and a 22,300 square foot CBRF facility. The new multi-family units are located downtown and will fill a demand for downtown housing opportunities, with 58 of those units providing affordable housing for individuals and families with low to moderate incomes.

\* Staff facilitated and approved the Plamann Park, Broadway Hills Estates, and Trail View Estates South annexations, resulting in roughly 309 acres of land being annexed.

\* Staff anticipates approximately 238 single-family residential lots and approximately 24 two-family residential (duplex) lots will be platted in 2020.

\* Staff partnered with the East Central Wisconsin Regional Planning Commission (ECWRPC) in meeting a new statutory requirement for the preparation of a Housing Affordability Report and a Housing Fee Report. Both reports were completed in December, 2019. An annual update to the reports is anticipated for 2020.

\* Staff continued to work intently with the developer, Appleton Storage I, LLC, to bring development to the former K-mart site at 2400 W. College Avenue which has been vacant for over a decade. The special-use development agreement was approved by Council in 2018, and the site plan and certified survey map (CSM) have also been conditionally approved in 2020.

\* Implemented a new on-line scheduling for property owners which reduced incoming Assessor phone calls by about 65%. Other Assessor efficiencies were created by cleaning up and streamlining our property data, implementing advanced features of our assessment software, and improving our pricing model for more accurate home value estimates.

\* The City's equalized value increased by 6% in 2020 from \$5,855,356,700 to \$6,200,311,200 which was consistent with the Statewide gain of 6%.

\* Appleton GIS software provider (ESRI) is undergoing a major platform shift away from its long-term core program ArcMap to a new product called ArcPro. Migration to ArcPro by the core GIS staff has begun along with planning for the migration by other GIS users. The change will effect internal procedures, run nightly scripts, as well as increase demands on hardware to run the larger more powerful ArcPro.

\* GIS team provided on-going technical support for the COVID-19 pandemic, including creating the City of Appleton COVID-19 website, streamlining the process of updating graphics for social media posts and automated daily updates for website, as well as assisting staff with work from home technical issues

\* Staff organized two neighborhood sessions in spring and fall, providing informal "roundtable" discussions to share information about the neighborhood program and grants, and for peer sharing.

\* The newly formed Appleton Public Arts Committee approved 5 public art projects during the second half of 2019. Staff worked collaboratively with numerous City departments to amend the review process in order to streamline committee and Common Council action on the review, approval and installation of these projects.

# CITY OF APPLETON 2021 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

## MAJOR 2021 OBJECTIVES

- \* Implement the City's updated 2010-2030 Comprehensive Plan providing input to development proposals and initiating zoning code changes (when necessary and in compliance with State Statutes) as identified in the Plan.
- \* Continue creation, execution and implementation of the City's Economic Development Strategic Plan, primary goals and key strategies that will result in development within targeted districts of the City and enhance the business climate and vibrancy of the community.
- \* Contact at least forty businesses in the City with information on business assistance programs and City support.
- \* Attract development to the City that will result in substantial tax base enhancement; target the % increase of net new construction at the Statewide average each year.
- \* Sell a minimum of four acres of business park land.
- \* Continue the on-going process of amending the zoning ordinance and subdivision ordinance.
- \* Coordinate and increase communication and shared vision between the technical review group, City departments, Plan Commission, Community and Economic Development Committee, Historic Preservation Commission, registered neighborhoods, Appleton Redevelopment Authority, Appleton Public Arts Committee, Common Council and the community.
- \* Work with the development community, elected and appointed officials, neighborhoods, non-government organizations, businesses and other City departments to formulate development proposals that align with City plans, ordinances and policies, as well as recognized industry practices.
- \* Continue to allow easier access to the City's GIS system by expanding and creating mobile applications utilizing ArcGIS online/portal.
- \* Inspect an extra 2,000 or more homes in 2021 to update older property records for a future Citywide revaluation. Up-to-date property data provides for accurate assessed values. Deploy our new mobile assessment software in this process for faster updating and fully utilize our MLS data service to update property data on sold properties.
- \* Continue to be a source of information and support to businesses, not-for-profits and our community through COVID-19.
- \* Support the Mayor's Task Force on Economic Development Experience.

DEPARTMENT BUDGET SUMMARY							
Programs		Actual		Budget			%
Unit	Title	2018	2019	Adopted 2020	Amended 2020	2021	Change *
<b>Program Revenues</b>		\$ 20,030	\$ 19,545	\$ 18,350	\$ 18,350	\$ 18,350	0.00%
<b>Program Expenses</b>							
15010	Administration	508,685	563,088	585,949	585,949	598,509	2.14%
15020	Planning	279,651	287,669	278,125	278,125	287,794	3.48%
15030	Marketing	149,586	130,494	173,819	200,344	177,312	2.01%
15040	New & Redevelopment	185,288	215,992	215,995	239,340	221,667	2.63%
15050	Assessing	567,128	581,806	590,080	590,080	610,624	3.48%
<b>TOTAL</b>		<b>\$ 1,690,338</b>	<b>\$ 1,779,049</b>	<b>\$ 1,843,968</b>	<b>\$ 1,893,838</b>	<b>1,895,906</b>	<b>2.82%</b>
<b>Expenses Comprised Of:</b>							
Personnel		1,588,176	1,667,315	1,685,250	1,685,250	1,738,542	3.16%
Training & Travel		15,764	14,699	16,800	16,800	17,100	1.79%
Supplies & Materials		17,984	18,984	24,289	24,289	22,024	-9.33%
Purchased Services		68,414	78,051	117,629	167,499	118,240	0.52%
<b>Full Time Equivalent Staff:</b>							
Personnel allocated to programs		16.87	16.97	16.97	16.97	16.93	

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Administration**

**Business Unit 15010**

**PROGRAM MISSION**

For the benefit of staff so that productivity, efficiency, product quality, delivery of service and job satisfaction are optimized, we will provide a healthy work environment including proper supervision, training, evaluation, coaching and support services to better the quality of life in Appleton.

**PROGRAM NARRATIVE**

**Link to City Goals:**

Implements Key Strategies #1: "Responsibly deliver excellent services", #2: "Encourage active community participation and involvement", #3: "Recognize and grow everyone's talents," #4: "Continually assess trends affecting the community and proactively respond", and #6: "Create opportunities and learn from successes and failures."

**Objectives:**

- Develop policies, procedures and processes, and perform required reporting for the department
- Continue to develop a standardized, coordinate-based and positionally accurate geographic information system (GIS) that meets the needs of all users
- Provide access to geographic and demographic information to City staff and, as appropriate, to the public

**Major changes in Revenue, Expenditures, or Programs:**

The Community Development Specialist's salary and fringe benefit costs are recorded in both this budget and in the Housing and Community Development Grants budget. The portion of the Specialist's salary and fringes reimbursable through the grant is charged to the grant budget while the remainder is charged here.

Printing costs include all copies made by City departments on the 5th floor color copier machine in Community and Economic Development.

**PERFORMANCE INDICATORS**

	<u>Actual 2018</u>	<u>Actual 2019</u>	<u>Target 2020</u>	<u>Projected 2020</u>	<u>Target 2021</u>
<b>Client Benefits/Impacts</b>					
Employee retention					
% staff turnover	0%	0%	0%	0%	0%
Accurate and useful information					
# of layers edited (GIS)	975	1,193	800	1,000	900
<b>Strategic Outcomes</b>					
Quality training to support staff performance					
% of training courses completed	100%	100%	100%	100%	100%
# of technical support calls/emails handled by GIS team					
New measure		—————>	500	700	600
<b>Work Process Outputs</b>					
Annual performance evaluations completed					
% complete	100%	100%	100%	100%	100%
Increase efficiency & effectiveness of City by using GIS					
# of GIS projects	460	362	250	275	250

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Administration**

**Business Unit 15010**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2018	2019	Adopted 2020	Amended 2020	2021
<b>Revenues</b>					
480100 General Charges for Svc	\$ 605	\$ 290	\$ 350	\$ 350	\$ 350
Total Revenue	<u>\$ 605</u>	<u>\$ 290</u>	<u>\$ 350</u>	<u>\$ 350</u>	<u>\$ 350</u>
<b>Expenses</b>					
610100 Regular Salaries	\$ 337,433	\$ 379,753	\$ 381,373	\$ 381,373	\$ 394,266
610500 Overtime Wages	1,448	1,549	-	-	-
615000 Fringes	137,710	149,329	164,482	164,482	166,284
620100 Training/Conferences	6,903	7,275	8,240	8,240	8,240
620600 Parking Permits	7,260	6,501	7,260	7,260	7,560
630100 Office Supplies	1,949	1,037	2,244	2,244	2,244
630200 Subscriptions	543	173	500	500	450
630300 Memberships & Licenses	3,012	2,545	3,200	3,200	3,200
630500 Awards & Recognition	181	312	270	270	285
630700 Food & Provisions	400	297	450	450	450
631500 Books & Library Materials	-	-	75	75	75
632001 City Copy Charges	8,200	9,725	13,550	13,550	11,550
632002 Outside Printing	804	1,459	-	-	-
632700 Miscellaneous Equipment	-	-	200	200	200
641200 Advertising	1,104	1,127	1,333	1,333	1,333
641307 Telephone	734	1,039	1,332	1,332	1,332
641308 Cellular Phones	1,004	967	1,440	1,440	1,040
Total Expense	<u>\$ 508,685</u>	<u>\$ 563,088</u>	<u>\$ 585,949</u>	<u>\$ 585,949</u>	<u>\$ 598,509</u>

**DETAILED SUMMARY OF 2021 PROPOSED EXPENDITURES > \$15,000**

None

# CITY OF APPLETON 2021 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**Planning**

**Business Unit 15020**

## PROGRAM MISSION

For the benefit of the entire community so that Appleton provides a balance between the community's growth needs and desires, thus ensuring an aesthetic and quality urban environment including those areas of historic value, we will provide planning, analysis, technical services and program/process coordination to assure citizen knowledge and interaction by complying with relevant codes, ordinances and regulations.

## PROGRAM NARRATIVE

**Link to Key Strategies:**

Implements Key Strategies #2: "Encourage active community participation and involvement", #4: "Continually assess trends affecting the community and proactively respond," #6: "Create opportunities and learn from successes and failures", and #7: "Communicate our success through stories and testimonials".

**Objectives:**

- \* Provide timely services to the public, development community and other agencies; provide technical and administrative support to the Common Council, the Plan Commission, Community and Economic Development Committee, Appleton Public Arts Committee and the Historic Preservation Commission in matters relating to the comprehensive plan, neighborhood program, zoning and subdivision ordinances, annexations, rezoning, special use permits, historic building and site designations, historic certificate awards, zoning text amendments, future streets, subdivisions, site plan appeals, business licenses and public land dedications and discontinuances
- \* Encourage the continued economic development of the City by working with developers, their representatives and the general public to facilitate and expedite their requests for development approval or general planning assistance
- \* Improve and protect the health, safety and welfare of Appleton citizens consistent with the Appleton subdivision ordinance, zoning ordinance, comprehensive plan and policies adopted by the Common Council with good land use planning and zoning practices
- \* Continue to maintain effective and efficient procedures for meeting legal requirements that set forth the most expeditious time period in which planning and historic preservation applications must be processed
- \* Continue to coordinate the technical review group and site plan review process
- \* Continue to monitor and maintain all elements of the comprehensive plan and all sections of the zoning ordinance and subdivision ordinance and process all suggested and required amendments to the comprehensive plan, zoning ordinance, subdivision ordinance and land use plan map, zoning map and official street map
- \* Continue to implement the goals, objectives and policies of the statutory elements of the comprehensive plan
- \* Provide expertise and technical assistance in administering the City's neighborhood program including assisting residents in registering their neighborhood, marketing the program to City residents and working with Appleton residents, other City staff and outside agencies to leverage resources to help improve Appleton's neighborhoods

**Major changes in Revenue, Expenditures, or Programs:**

The \$300 formerly budgeted for Planning Awards as it relates to historic preservation projects has been incorporated into the Marketing and Business Services existing budget for economic development projects and initiatives.

## PERFORMANCE INDICATORS

	<u>Actual 2018</u>	<u>Actual 2019</u>	<u>Target 2020</u>	<u>Projected 2020</u>	<u>Target 2021</u>
<b>Client Benefits/Impacts</b>					
Timely, accurate processing of applications					
% of applications processed within the timeframe per ordinance	100%	100%	100%	100%	100%
<b>Strategic Outcomes</b>					
High-quality development that aligns with City plans, ordinances, and policies, as well as recognized industry best practices					
# of development projects guided through the review process, resulting in approval	48	33	30	35	30
# of comp plan goals and objectives implemented	73	73	40	70	40
<b>Work Process Outputs</b>					
Services performed					
# of admin applications approved	353	431	425	425	425
# of commission applications approved	47	47	30	45	30
# of customers inquiries served	1,319	1,111	900	1,200	900
# of comp plan and ordinance amendments adopted	4	2	2	2	2
# of historic sites, buildings, districts recognized/researched	150	2	2	4	2
# of public art projects approved	New measure	5	3	3	3

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Planning**

**Business Unit 15020**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2018	2019	Adopted 2020	Amended 2020	2021
Revenues					
500200 Zoning & Subdivision Fees	\$ 19,425	\$ 19,255	\$ 18,000	\$ 18,000	\$ 18,000
Total Revenue	<u>\$ 19,425</u>	<u>\$ 19,255</u>	<u>\$ 18,000</u>	<u>\$ 18,000</u>	<u>\$ 18,000</u>
Expenses					
610100 Regular Salaries	\$ 196,393	\$ 206,138	\$ 207,479	\$ 207,479	\$ 215,799
615000 Fringes	83,246	81,531	70,346	70,346	71,995
620100 Training/Conferences	12	-	-	-	-
630500 Awards & Recognition	-	-	300	300	-
Total Expense	<u>\$ 279,651</u>	<u>\$ 287,669</u>	<u>\$ 278,125</u>	<u>\$ 278,125</u>	<u>\$ 287,794</u>

**DETAILED SUMMARY OF 2021 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 15030**

**PROGRAM MISSION**

For the benefit of Appleton's current and prospective businesses and developers, so that business assistance services are identified and conveyed, and Appleton is selected as the prime location for investment, we will provide information and expertise to address business issues and promote the community.

**PROGRAM NARRATIVE**

**Link to City Goals:**

Implements Key Strategies #2: "Encourage active community participation and involvement", #3: "Recognize and grow everyone's talents", #4: "Continually assess trends affecting the community and proactively respond," #6: "Create opportunities and learn from successes and failures", and #7: "Communicate our success through stories and testimonials."

**Objectives:**

- Continue to enhance the environment in Appleton to promote business and industry and attract investment
- Continue to examine ways in which City government can be improved to be more responsive, supportive and proactive to business needs
- Promote Appleton to the broader public, especially business and industry
- Conduct business retention visits
- Provide technical assistance for start-up and growing companies
- Assist and be responsive to prospective and established businesses and developers
- Promote the City's interest and develop positive relationships through active participation on various boards, committees and organizations
- Continue implementation of the Comprehensive Plan 2010-2030 and Economic Development Strategic Plan

**Major changes in Revenue, Expenditures, or Programs:**

The City's "% of Fox Cities equalized value" and the "% of Fox Cities net new construction" are new measures for 2021, replacing "# of businesses assisted" and "# of prospect information deliveries". Tracking Appleton's percentage of the Fox Cities represented by equalized value and comparing that to the City's percentage of the Fox Cities' net new construction represents the City's growth compared to the overall Fox Cities. Observation of equalized value and net new construction trends are important for long-term vitality of the City.

**PERFORMANCE INDICATORS**

	<u>Actual 2018</u>	<u>Actual 2019</u>	<u>Target 2020</u>	<u>Projected 2020</u>	<u>Target 2021</u>
<b>Client Benefits/Impacts</b>					
Attract Appleton's rate of net new construction					
City's % of Fox Cities equalized value	New measure	—————>		28%	28%
City's % of Fox Cities net new construction	New measure	—————>		20%	25%
<b>Strategic Outcomes</b>					
Appleton's economy grows and tax base enhanced					
% increase in net new construction	1.58%	1.35%	1.75%	1.16%	1.60%
<b>Work Process Outputs</b>					
Retention visit clients served					
# business retention visits/follow-ups	46	41	40	40	40



**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 15030**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2018	2019	Adopted 2020	Amended 2020	2021
Expenses					
610100 Regular Salaries	\$ 78,802	\$ 80,340	\$ 80,021	\$ 80,021	\$ 83,052
615000 Fringes	26,309	25,442	27,798	27,798	28,260
643100 Interpreter Services	-	-	-	-	-
659900 Other Contracts/Obligation	44,475	24,712	66,000	92,525	66,000
Total Expense	<u>\$ 149,586</u>	<u>\$ 130,494</u>	<u>\$ 173,819</u>	<u>\$ 200,344</u>	<u>\$ 177,312</u>

**DETAILED SUMMARY OF 2021 PROPOSED EXPENDITURES > \$15,000**

Other Contracts/Obligations

Small business & workforce development initiatives	\$ 36,000
Fox Cities Regional Partnership support	30,000
	<u>\$ 66,000</u>

# CITY OF APPLETON 2021 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**New and Redevelopment Projects**

**Business Unit 15040**

## PROGRAM MISSION

For the benefit of targeted businesses and/or developers so that desired development occurs, we will prospect, encourage, direct, negotiate, coordinate and secure development projects.

## PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategies #2: "Encourage active community participation and involvement", #4: "Continually assess trends affecting the community and proactively respond", and #6: "Create opportunities and learn from successes and failures".

**Objectives:**

Provide quality information and direction, as well as financial and technical assistance, to businesses seeking to expand or locate within the City

Act as ombudsman for developers pursuing investments in the City

Increase the commercial and industrial components' respective shares of the City's tax base, giving highest priority to redevelopment areas and tax incremental financing districts

Create developable parcels throughout the City, especially within the City's industrial and business parks, redevelopment districts, tax incremental financing districts and registered neighborhoods

Identify Brownfield sites within Appleton and, when feasible and appropriate, mitigate those sites to bring them back to community use

Plan and manage projects conducted to acquire land for industrial and business park expansion, provide necessary infrastructure to facilitate developments of raw land and secure the appropriate public approvals to allow development to occur

**Major changes in Revenue, Expenditures, or Programs:**

The "% change in equalized value" is a new measure for 2021, replacing "\$ increase industrial/commercial", "\$ increase in target districts", and "\$ business park permits". Tracking equalized value provides a more accurate measure of tax base enhanced than permit data as it takes into account tax exempt vs. non-exempt property. Permit data is based on estimates of cost prior to construction where equalized value represents actual values after properties are improved. Equalized % change is composed of both Net New Construction (of which the city has some control over) and an Economic Adjustment for the amount of real estate appreciation (of which the city has less control over).

## PERFORMANCE INDICATORS

	<u>Actual 2018</u>	<u>Actual 2019</u>	<u>Target 2020</u>	<u>Projected 2020</u>	<u>Target 2021</u>
<b>Client Benefits/Impacts</b>					
Assist in land assembly, development incentives, or project management					
# developments generated via direct management	9	13	5	15	12
# of improved business park acres	170	100	117	117	117
<b>Strategic Outcomes</b>					
Tax base enhanced					
% change in equalized value	4.2%	7.6%	New measure	5.9%	4.0%
<b>Work Process Outputs</b>					
# of acres sold in business park	15	6.7	4	12.5	4

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**New and Redevelopment Projects**

**Business Unit 15040**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2018	2019	Adopted 2020	Amended 2020	2021
Expenses					
610100 Regular Salaries	\$ 134,212	\$ 136,664	\$ 136,123	\$ 136,123	\$ 141,121
615000 Fringes	46,672	45,307	49,872	49,872	50,546
640400 Consulting Services	4,404	34,021	30,000	53,345	30,000
Total Expense	<u>\$ 185,288</u>	<u>\$ 215,992</u>	<u>\$ 215,995</u>	<u>\$ 239,340</u>	<u>\$ 221,667</u>

**DETAILED SUMMARY OF 2021 PROPOSED EXPENDITURES > \$15,000**

Consulting Services

Environmental assessments,  
site analysis, development  
due diligence, etc.

\$ 30,000
<u>\$ 30,000</u>

## CITY OF APPLETON 2021 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**Assessing**

**Business Unit 15050**

### PROGRAM MISSION

The Appleton Assessor's Office, as a professional team, exists to maintain equitable market value assessments and serve as an informational resource to the community.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy #4: "Continuously assess trends affecting the community and proactively respond" and #6: "Create opportunities and learn from successes and failures".

**Objectives:**

Inspect an extra 2,000 or more homes in 2021 to update older property records for a future Citywide revaluation. Up-to-date property data provides for accurate assessed values. Deploy our new mobile assessment software in this process for faster updating and fully utilize our MLS data service to update property data on sold properties.

Continue to employ the more advanced features of our new Patriot assessment software for better data consistency

Develop future leaders for the Assessor's division as part of the City's succession planning initiative. Accomplish this through cross-training, advanced courses, assessor certification exams, and leadership development opportunities

**Major changes in Revenue, Expenditures, or Programs:**

Fewer interior building inspections were performed in 2020 as a COVID-19 precaution. Due to this, the percentage of new buildings inspected and the total number of interior inspections were lower than targeted.

The CEA charges for 2021 are increased from 2020 to reflect the significant increase in the number of home inspections to be completed in 2021.

### PERFORMANCE INDICATORS

	<u>Actual 2018</u>	<u>Actual 2019</u>	<u>Target 2020</u>	<u>Projected 2020</u>	<u>Target 2021</u>
<b>Client Benefits/Impacts</b>					
Equitable assessments and equitable distribution of tax levy:					
Assessment districts within 10% of market value	52%	100%	100%	93%	100%
Coefficient of dispersion of assessment/sale ratios	13%	7%	10%	7%	10%
# assessment errors resulting in inaccurate taxes	3	3	0	2	0
<b>Strategic Outcomes</b>					
Assessments accurately reflect market values:					
Residential class level of assessment	90%	99%	100%	96%	100%
Commercial class level of assessment	95%	97%	100%	94%	100%
Overall level of assessment	90%	98%	100%	95%	100%
<b>Work Process Outputs</b>					
Building Information updated:					
% Commercial new buildings inspected	100%	100%	100%	60%	100%
% Residential new buildings inspected	87%	90%	85%	66%	85%
% Sold buildings updated	25%	11%	35%	44%	50%
Total # of interior inspections citywide	604	352	900	450	2,500
Property record maintenance:					
Deeds processed (ownership changes)	2,617	2,363	2,300	1,750	2,000
Lot splits, CSM's, & new platted parcels	227	244	230	290	250
Annexed parcel(s)	11	4	5	28	10
Assessments updated	1,613	23,257	900	850	900

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

Assessing

Business Unit 15050

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2018	2019	Adopted 2020	Amended 2020	2021
Expenses					
610100 Regular Salaries	\$ 395,137	\$ 406,057	\$ 405,563	\$ 405,563	\$ 421,697
610500 Overtime Wages	2,476	3,304	1,300	1,300	1,352
615000 Fringes	148,336	151,901	160,893	160,893	164,170
620100 Training/Conferences	1,589	923	1,300	1,300	1,300
630200 Subscriptions	1,205	1,726	1,700	1,700	1,800
630300 Memberships & Licenses	330	330	400	400	350
632700 Miscellaneous Equipment	1,360	1,380	1,400	1,400	1,420
641308 Cellular Phones	1,441	1,440	1,440	1,440	1,000
642501 CEA Operations/Maint.	1,540	998	2,409	2,409	3,478
642502 CEA Depreciation/Replace.	1,763	1,658	1,575	1,575	1,557
659900 Other Contracts/Obligation	11,951	12,089	12,100	12,100	12,500
Total Expense	<u>\$ 567,128</u>	<u>\$ 581,806</u>	<u>\$ 590,080</u>	<u>\$ 590,080</u>	<u>\$ 610,624</u>

**DETAILED SUMMARY OF 2021 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2021 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

	2018 <u>ACTUAL</u>	2019 <u>ACTUAL</u>	2020 <u>YTD ACTUAL</u>	2020 <u>ORIG BUD</u>	2020 <u>REVISED BUD</u>	2021 <u>BUDGET</u>
<b>Charges for Services</b>						
480100 General Charges for Service	605	290	295	350	350	350
500200 Zoning & Subdivision Fees	19,425	19,255	12,880	18,000	18,000	18,000
<b>TOTAL PROGRAM REVENUES</b>	<u>20,030</u>	<u>19,545</u>	<u>13,175</u>	<u>18,350</u>	<u>18,350</u>	<u>18,350</u>
<b>Salaries</b>						
610100 Regular Salaries	991,525	1,063,366	624,880	1,210,059	1,210,059	1,255,935
610200 Labor Pool Allocations	16,565	13,512	-	-	-	-
610500 Overtime Wages	3,924	4,853	694	1,300	1,300	1,352
611000 Other Compensation	500	500	500	500	500	-
611400 Sick Pay	1,973	-	-	-	-	-
611500 Vacation Pay	131,416	131,573	52,874	-	-	-
615000 Fringes	442,273	453,511	262,657	473,391	473,391	481,255
<b>TOTAL PERSONNEL</b>	<u>1,588,176</u>	<u>1,667,315</u>	<u>941,605</u>	<u>1,685,250</u>	<u>1,685,250</u>	<u>1,738,542</u>
<b>Training~Travel</b>						
620100 Training/Conferences	8,504	8,198	2,467	9,540	9,540	9,540
620600 Parking Permits	7,260	6,501	7,562	7,260	7,260	7,560
<b>TOTAL TRAINING / TRAVEL</b>	<u>15,764</u>	<u>14,699</u>	<u>10,029</u>	<u>16,800</u>	<u>16,800</u>	<u>17,100</u>
<b>Supplies</b>						
630100 Office Supplies	1,949	1,037	1,146	2,244	2,244	2,244
630200 Subscriptions	1,748	1,899	765	2,200	2,200	2,250
630300 Memberships & Licenses	3,342	2,875	2,191	3,600	3,600	3,550
630500 Awards & Recognition	181	312	-	570	570	285
630700 Food & Provisions	400	297	152	450	450	450
631500 Books & Library Materials	-	-	63	75	75	75
632001 City Copy Charges	8,200	9,725	3,562	13,550	13,550	11,550
632002 Outside Printing	804	1,459	184	-	-	-
632700 Miscellaneous Equipment	1,360	1,380	1,400	1,600	1,600	1,620
<b>TOTAL SUPPLIES</b>	<u>17,984</u>	<u>18,984</u>	<u>9,463</u>	<u>24,289</u>	<u>24,289</u>	<u>22,024</u>
<b>Purchased Services</b>						
640400 Consulting Services	4,404	34,021	-	30,000	53,345	30,000
641200 Advertising	1,104	1,127	648	1,333	1,333	1,333
641307 Telephone	734	1,039	614	1,332	1,332	1,332
641308 Cellular Phones	2,443	2,407	589	2,880	2,880	2,040
642501 CEA Operations/Maint.	1,540	998	224	2,409	2,409	3,478
642502 CEA Depreciation/Replace.	1,763	1,658	656	1,575	1,575	1,557
643100 Interpreter Services	-	-	-	-	-	-
659900 Other Contracts/Obligation	56,426	36,801	61,225	78,100	104,625	78,500
<b>TOTAL PURCHASED SVCS</b>	<u>68,414</u>	<u>78,051</u>	<u>63,956</u>	<u>117,629</u>	<u>167,499</u>	<u>118,240</u>
<b>TOTAL EXPENSE</b>	<u>1,690,338</u>	<u>1,779,049</u>	<u>1,025,053</u>	<u>1,843,968</u>	<u>1,893,838</u>	<u>1,895,906</u>