

**CITY OF APPLETON 2018 BUDGET**

**COMMUNITY & ECONOMIC DEVELOPMENT**

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# CITY OF APPLETON 2018 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 2017 EVENTS

In 2017, the Community and Economic Development Department continued to deliver services to the public with a focus on meeting the community needs and enhancing the quality of life.

- \* Industrial development saw a continued increase in 2017 with the sale of two lots in the Southpoint Commerce Park. Land sales totaling 6.64 acres resulted in a total sale price of \$282,300. Custom Offsets intends to start construction on a 17,000 square foot facility by the end of summer.
- \* The Appleton Redevelopment Authority sold the Former Foremost parcel, a redevelopment site comprised of approximately 8.1 acres, in 2017 to Alexander Company and Tukka, the developers of Eagle Point. The groundbreaking was held on May 4, 2017 for a \$21 million, 99 unit senior living facility which is the first phase of this project.
- \* RiverHeath completed construction of the 90 room Courtyard by Marriot that is slated to open in October, 2017. The Woolen Mills Loft, a \$10 million, 60 unit apartment complex constructed in the Flats will open in December. This project used WHEDA tax credits and historic tax credits.
- \* Continued efforts to construct and finance the Exhibition Center with a focus on communication with nine other municipalities, the ARA, the Exhibition Center Advisory Committee and the Hotel Room Tax Commission. The construction of the Exhibition Center is anticipated to be complete in fall of 2017.
- \* The department continues to work and communicate with the business community in Appleton and throughout the region with efforts including social media, regular business retention visits and partnerships with community organizations that help build relationships that benefit the City.
- \* The council approved the updates to the Comprehensive Plan on March 15, 2017, marking the culmination of an 18 month process that included intensive public engagement with approximately 1,100 respondents to a survey, 4 public envisioning sessions, an interactive map, and several public presentations.
- \* A new Assessor software system has replaced the aging I-series Assessor system. This year-long data conversion project of all 26,000 properties and 2,000 business accounts in the City was successfully completed this summer by the IT and assessor staff. The new system integrates the City's GIS system to facilitate assessor data analysis, provides user friendly querying of property data, automates state reporting, and provides for batch calculating along with other enhancements.
- \* The City's equalized value increased greatly by 6% in 2017 from \$4,938,725,300 to \$5,222,923,900 exceeding the statewide gain of 4%. Two new proposed TIDs were created in 2017 with TIF #11 on East College Avenue created as a blighted TIF and TIF #12 on West College created as a rehabilitation/ conservation TIF. Both were approved in September, 2017.
- \* During the first half of 2017, the site plan review team has approved 8 multi-family dwelling units, approximately 100,000 square feet of office space, and 3,180 square feet of commercial space.
- \* Per the annual growth report, the City had approximately 210 single family residential lots platted and available for sale starting in 2017. Final plat approval resulted in the creation of an additional 26 residential lots. The City still has several acres of planned unplatted land available for single family development.
- \* Appleton's GIS team performed a major system upgrade during the first half of 2017. All of the GIS servers were migrated from a Windows Server 2008 environment to a Windows Server 2012 environment to fit into the IT Department's server management program. Additionally, the GIS data server's SQL Server version was upgraded from 2008 to 2014. Upgrades were done on the water maintenance and tree inventory iPad applications to enhance user options and to allow for more data collection by field staff.
- \* A GIS team member was trained and received their pilot's license to fly a drone. The training course covered topics such as: federal statutes, safety procedures, emergency protocol, aviation weather decryption, chart comprehension, aeronautical terms and airports operation, and how to deal with contentious situations where public opinions oppose the use of drones. It is anticipated the drone will be used to highlight TIF Districts, development sites, events, etc.
- \* Staff organized and delivered two neighborhood sessions in 2017, one in the spring and one in the fall, providing an informal, "roundtable" discussion for neighborhood leaders to share information about the neighborhood program, grants, and to provide a forum for peer sharing.
- \* A Neighborhood Grant for \$60,000 was approved for the St. Bernadette Parish/Thompson Center in the Lourdes Drive neighborhood, along with one smaller grant from the general fund for the Erb Park neighborhood.

## CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

### MAJOR 2018 OBJECTIVES

- \* Implement the newly updated City's 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 the 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 remains 2.6% of new equalized value.
- \* Sell four acres of business park land.
- \* Continue multi-year process of a comprehensive re-write of the zoning ordinance and amendments to the official zoning map.
- \* 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, Common Council and community.
- \* Work with the development community, elected and appointed officials, neighborhoods, non-government organizations, businesses and other City departments to formulate development proposals that aligns with City plans, ordinances and policies, as well as recognized industry practices.
- \* Continue to allow easier access to the City's GIS system by enhancing existing mobile applications, creating new applications, utilizing ArcGIS online as well as creating access for smartphones and tablets. Utilize upgraded server structure to better organize our external web applications and allow for more "real-time" updates to GIS data.
- \* The Assessor's division will perform a City-wide revaluation of all commercial property including apartments in 2018. Revaluations are completed at least once every five years to maintain 100% fair market value assessments. Revaluing these 1,700 properties will require: inspecting properties, researching current listing and sale prices, analyzing assessment/sale price ratios, collecting and analyzing rental income data and income multipliers, applying appropriate replacement values and depreciation, defending the assessments, etc. It will be performed in-house using existing staff and resources.
- \* Begin a Citywide revaluation of all 23,500 residential properties for 2019. By year-end 2018, we will have entered new land values, analyzed sales, completed the neighborhood ratio analysis, collected and analyzed rents, and set about 20% of the new improvement values. This large project was last performed in 2014 and will be completed in-house with no outside help or additional staff needed.

| DEPARTMENT BUDGET SUMMARY          |                     |                     |                     |                     |                     |                  |               |
|------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|------------------|---------------|
| Programs                           |                     | Actual              |                     | Budget              |                     |                  | %             |
| Unit                               | Title               | 2015                | 2016                | Adopted 2017        | Amended 2017        | 2018             | Change *      |
| <b>Program Revenues</b>            |                     | \$ 22,688           | \$ 17,310           | \$ 20,800           | \$ 20,800           | \$ 18,800        | -9.62%        |
| <b>Program Expenses</b>            |                     |                     |                     |                     |                     |                  |               |
| 10550                              | Administration      | 507,898             | 527,332             | 534,275             | 538,802             | 554,582          | 3.80%         |
| 10551                              | Marketing           | 224,567             | 216,086             | 245,793             | 173,797             | 174,664          | -28.94%       |
| 10553                              | New & Redevelopment | 183,650             | 195,468             | 200,544             | 200,544             | 208,114          | 3.77%         |
| 15020                              | Planning            | 258,018             | 271,934             | 269,731             | 271,504             | 280,414          | 3.96%         |
| 13520                              | Assessing           | 525,688             | 542,794             | 539,026             | 541,206             | 558,402          | 3.59%         |
| <b>TOTAL</b>                       |                     | <b>\$ 1,699,821</b> | <b>\$ 1,753,614</b> | <b>\$ 1,789,369</b> | <b>\$ 1,725,853</b> | <b>1,776,176</b> | <b>-0.74%</b> |
| <b>Expenses Comprised Of:</b>      |                     |                     |                     |                     |                     |                  |               |
| Personnel                          |                     | 1,564,834           | 1,601,832           | 1,619,909           | 1,556,393           | 1,613,599        | -0.39%        |
| Administrative Expense             |                     | 20,553              | 22,390              | 29,530              | 29,530              | 25,330           | -14.22%       |
| Supplies & Materials               |                     | 13,803              | 11,255              | 14,075              | 14,075              | 13,475           | -4.26%        |
| Purchased Services                 |                     | 89,844              | 109,108             | 116,400             | 116,400             | 115,000          | -1.20%        |
| Utilities                          |                     | 3,834               | 4,012               | 4,212               | 4,212               | 4,212            | 0.00%         |
| Repair & Maintenance               |                     | 6,953               | 5,017               | 5,243               | 5,243               | 4,560            | -13.03%       |
| Capital Expenditures               |                     | -                   | -                   | -                   | -                   | -                | N/A           |
| <b>Full Time Equivalent Staff:</b> |                     |                     |                     |                     |                     |                  |               |
| Personnel allocated to programs    |                     | 18.13               | 18.13               | 17.81               | 16.81               | 16.87            |               |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Administration**

**Business Unit 10550**

**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: "Prompt delivery of 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:**

Administrative processing, procedures and reporting for the department.

Continue to develop a standardized, coordinate-based and positionally accurate geographic information system (GIS) that meet 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. Due to a reduction in State grant funding, more of the position's salary and fringe benefit costs are reflected in this budget.

**PERFORMANCE INDICATORS**

|  | <u>Actual 2015</u> | <u>Actual 2016</u> | <u>Target 2017</u> | <u>Projected 2017</u> | <u>Target 2018</u> |
|--|--------------------|--------------------|--------------------|-----------------------|--------------------|
| <b>Client Benefits/Impacts</b>                           |                    |                    |                    |                       |                    |
| Employee retention                                       |                    |                    |                    |                       |                    |
| % staff turnover   | 5%                 | 5%                 | 0%                 | 5%                    | 0%                 |
| Accurate and useful information                          |                    |                    |                    |                       |                    |
| # of layers edited (GIS)                                 | 1,380              | 1,403              | 700                | 1,250                 | 700                |
| Improve business and work flow                           |                    |                    |                    |                       |                    |
| # of users supported on GIS software                     | 136                | 137                | 130                | 135                   | 130                |
| <b>Strategic Outcomes</b>                                |                    |                    |                    |                       |                    |
| Quality training to support staff performance            |                    |                    |                    |                       |                    |
| % of training courses completed                          | 100%               | 100%               | 100%               | 100%                  | 100%               |
| % of depts. using GIS                                    | 50%                | 50%                | 50%                | 50%                   | 50%                |
| <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  | 358                | 379                | 250                | 290                   | 250                |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Administration**

**Business Unit 10550**

**PROGRAM BUDGET SUMMARY**

| Description                     | Actual            |                   | Budget            |                   |                   |
|---------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                 | 2015              | 2016              | Adopted 2017      | Amended 2017      | 2018              |
| <b>Revenues</b>                 |                   |                   |                   |                   |                   |
| 4801 Charges for Serv. - Nontax | \$ 831            | \$ 880            | \$ 800            | \$ 800            | \$ 800            |
| 5020 Donations & Memorials      | 1,502             | -                 | -                 | -                 | -                 |
| <b>Total Revenue</b>            | <b>\$ 2,333</b>   | <b>\$ 880</b>     | <b>\$ 800</b>     | <b>\$ 800</b>     | <b>\$ 800</b>     |
| <b>Expenses</b>                 |                   |                   |                   |                   |                   |
| 6101 Regular Salaries           | \$ 358,905        | \$ 350,643        | \$ 353,499        | \$ 357,440        | \$ 365,273        |
| 6105 Overtime                   | -                 | 409               | -                 | -                 | -                 |
| 6150 Fringes                    | 114,139           | 143,777           | 140,424           | 141,010           | 151,332           |
| 6201 Training\Conferences       | 5,866             | 6,753             | 10,000            | 10,000            | 8,000             |
| 6206 Parking Permits            | 7,182             | 7,412             | 7,620             | 7,620             | 7,260             |
| 6301 Office Supplies            | 2,303             | 1,608             | 2,200             | 2,200             | 2,200             |
| 6302 Subscriptions              | 363               | 348               | 500               | 500               | 500               |
| 6303 Memberships & Licenses     | 1,974             | 2,180             | 3,200             | 3,200             | 3,200             |
| 6305 Awards & Recognition       | 270               | 270               | 285               | 285               | 270               |
| 6307 Food & Provisions          | 365               | 527               | 400               | 400               | 400               |
| 6315 Books & Library Materials  | 137               | -                 | 75                | 75                | 75                |
| 6320 Printing & Reproduction    | 12,356            | 9,903             | 11,800            | 11,800            | 11,800            |
| 6327 Miscellaneous Equipment    | -                 | -                 | 200               | 200               | 200               |
| 6412 Advertising                | 1,645             | 930               | 1,300             | 1,300             | 1,300             |
| 6413 Utilities                  | 2,393             | 2,572             | 2,772             | 2,772             | 2,772             |
| <b>Total Expense</b>            | <b>\$ 507,898</b> | <b>\$ 527,332</b> | <b>\$ 534,275</b> | <b>\$ 538,802</b> | <b>\$ 554,582</b> |

**DETAILED SUMMARY OF 2018 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 10551**

**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. We are committed to fostering diversity through policies, processes, programs and educational opportunities that promote understanding and acceptance for all people while creating and supporting a culture of inclusion that celebrates and values our similarities and differences.

**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:**

Salaries, fringe benefits and associated administration costs have decreased with the transfer of the Diversity Coordinator position to the Mayor's office.

The \$36,000 for the Fox Cities Regional Partnership in this budget is for economic development projects such as site selector familiarization tours, YP Week, Talent Upload, The Artery, and the Bazar After Dark Night Market.

**PERFORMANCE INDICATORS**

|  | <u>Actual 2015</u> | <u>Actual 2016</u> | <u>Target 2017</u> | <u>Projected 2017</u> | <u>Target 2018</u> |
|--|--------------------|--------------------|--------------------|-----------------------|--------------------|
| <b>Client Benefits/Impacts</b>                       |                    |                    |                    |                       |                    |
| Connection to source of issue resolution or resource |                    |                    |                    |                       |                    |
| # Existing businesses assisted                       | 23                 | 35                 | 40                 | 53                    | 40                 |
| # Start-up businesses assisted                       | 15                 | 11                 | 35                 | 20                    | 35                 |
| Information specific to development in Appleton      |                    |                    |                    |                       |                    |
| # of prospects information deliveries                | 34                 | 31                 | 70                 | 100                   | 70                 |
| <b>Strategic Outcomes</b>                            |                    |                    |                    |                       |                    |
| Appleton's economy grows and tax base enhanced       |                    |                    |                    |                       |                    |
| % increase in total equalized value                  | 2.60%              | 2.06%              | 2.60%              | 6.00%                 | 2.60%              |
| <b>Work Process Outputs</b>                          |                    |                    |                    |                       |                    |
| Retention visit clients served                       |                    |                    |                    |                       |                    |
| # Business retention visits/follow-ups               | 30                 | 38                 | 40                 | 40                    | 40                 |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 10551**

**PROGRAM BUDGET SUMMARY**

| Description                      | Actual            |                   | Budget            |                   |                   |
|----------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                  | 2015              | 2016              | Adopted 2017      | Amended 2017      | 2018              |
| Expenses                         |                   |                   |                   |                   |                   |
| 6101 Regular Salaries            | \$ 120,351        | \$ 102,310        | \$ 122,859        | \$ 74,624         | \$ 76,691         |
| 6150 Fringes                     | 44,758            | 39,216            | 48,209            | 24,448            | 25,973            |
| 6303 Membership & Licenses       | 135               | 701               | 725               | 725               | -                 |
| 6305 Awards & Recognition        | -                 | -                 | 500               | 500               | -                 |
| 6412 Advertising                 | 288               | -                 | 1,000             | 1,000             | -                 |
| 6431 Interpreter Services        | -                 | 508               | 500               | 500               | -                 |
| 6599 Other Contracts/Obligations | 59,035            | 73,351            | 72,000            | 72,000            | 72,000            |
| Total Expense                    | <u>\$ 224,567</u> | <u>\$ 216,086</u> | <u>\$ 245,793</u> | <u>\$ 173,797</u> | <u>\$ 174,664</u> |

**DETAILED SUMMARY OF 2018 PROPOSED EXPENDITURES > \$15,000**

Other Contracts/Obligations

|   |                  |
|---|------------------|
| Fox Cities Regional Partnership               | \$ 36,000        |
| Economic development projects and initiatives | 36,000           |
|   | <u>\$ 72,000</u> |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**New and Redevelopment Projects**

**Business Unit 10553**

**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:**

No major program changes.

**PERFORMANCE INDICATORS**

|  | <u>Actual 2015</u> | <u>Actual 2016</u> | <u>Target 2017</u> | <u>Projected 2017</u> | <u>Target 2018</u> |
|--|--------------------|--------------------|--------------------|-----------------------|--------------------|
| <b>Client Benefits/Impacts</b>   |                    |                    |                    |                       |                    |
| Guidance rec'd to success in dev. in Appleton                          |                    |                    |                    |                       |                    |
| # projects consulted   | 16                 | 16                 | 18                 | 21                    | 20                 |
| Assist in land assembly, development incentives, or project management |                    |                    |                    |                       |                    |
| # developments generated via direct management                         | 1                  | 1                  | 5                  | 4                     | 5                  |
| # of improved business park acres                                      | 100                | 100                | 100                | 100                   | 100                |
| <b>Strategic Outcomes</b>  |                    |                    |                    |                       |                    |
| Tax base enhanced  |                    |                    |                    |                       |                    |
| \$ increase industrial/commercial                                      | \$ 17,489,346      | \$ 25,082,437      | \$ 8,000,000       | \$ 13,800,000         | \$ 14,000,000      |
| \$ increase in target districts  | \$ 40,221,393      | \$ 20,377,086      | \$ 4,000,000       | \$ 4,400,000          | \$ 4,000,000       |
| \$ business park permits   | \$ 36,803,195      | \$ 18,606,737      | \$ 2,000,000       | \$ 3,322,100          | \$ 2,000,000       |
| <b>Work Process Outputs</b>  |                    |                    |                    |                       |                    |
| # of development agreements completed                                  | 0                  | 0                  | 1                  | 3                     | 3                  |
| # of acres sold in business park                                       | 7                  | 8.65               | 3                  | 6.64                  | 4                  |



**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**New and Redevelopment Projects**

**Business Unit 10553**

**PROGRAM BUDGET SUMMARY**

| Description              | Actual            |                   | Budget            |                   |                   |
|--------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                          | 2015              | 2016              | Adopted 2017      | Amended 2017      | 2018              |
| Expenses                 |                   |                   |                   |                   |                   |
| 6101 Regular Salaries    | \$ 125,082        | \$ 128,442        | \$ 126,811        | \$ 126,811        | \$ 131,423        |
| 6150 Fringes             | 40,649            | 44,326            | 43,733            | 43,733            | 46,691            |
| 6404 Consulting Services | 17,919            | 22,700            | 30,000            | 30,000            | 30,000            |
| Total Expense            | <u>\$ 183,650</u> | <u>\$ 195,468</u> | <u>\$ 200,544</u> | <u>\$ 200,544</u> | <u>\$ 208,114</u> |

**DETAILED SUMMARY OF 2018 PROPOSED EXPENDITURES > \$15,000**

Consulting Services

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

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

**CITY OF APPLETON 2018 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 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 maximum time periods in which planning and historic preservation applications must be accomplished.
- \* Continue to coordinate the technical review group 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 nine statutory elements of the comprehensive plan.
- \* Provide the 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:**

No major program changes.

**PERFORMANCE INDICATORS**

|   | <b>Actual 2015</b> | <b>Actual 2016</b> | <b>Target 2017</b> | <b>Projected 2017</b> | <b>Target 2018</b> |
|---|--------------------|--------------------|--------------------|-----------------------|--------------------|
| <b>Client Benefits/Impacts</b>  |                    |                    |                    |                       |                    |
| Timely, accurate processing of applications   |                    |                    |                    |                       |                    |
| % of admin apps processed within the timeframe per ordinance  | 100%               | 100%               | 100%               | 100%                  | 100%               |
| % of commission apps processed within the timeframe per ordinance   | 100%               | 100%               | 100%               | 100%                  | 100%               |
| % of customers inquiries served within the timeframe per department policy  | 100%               | 100%               | 100%               | 100%                  | 100%               |
| % of complaints received on admin apps  | 0%                 | 0%                 | 2%                 | 1%                    | 0%                 |
| % of complaints received on commission applications   | 0%                 | 0%                 | 2%                 | 1%                    | 0%                 |
| <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  |                    | 15                 | 20                 | 22                    | 20                 |
| # of comp plan goals and objectives implemented   | 9                  | 6                  | 10                 | 12                    | 10                 |
| <b>Work Process Outputs</b>   |                    |                    |                    |                       |                    |
| Services performed  |                    |                    |                    |                       |                    |
| # of admin applications approved  | 449                | 429                | 425                | 430                   | 425                |
| # of commission applications approved   | 53                 | 34                 | 25                 | 30                    | 25                 |
| # of customers inquiries served   | 1,374              | 1,043              | 900                | 975                   | 900                |
| # of comp plan and ordinance amendments adopted   | 6                  | 3                  | 2                  | 4                     | 2                  |
| # of historic sites, buildings, districts recognized/researched   | 2                  | 5                  | 2                  | 3                     | 2                  |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Planning**

**Business Unit 15020**

**PROGRAM BUDGET SUMMARY**

| Description                    | Actual     |            | Budget       |              |            |
|--------------------------------|------------|------------|--------------|--------------|------------|
|                                | 2015       | 2016       | Adopted 2017 | Amended 2017 | 2018       |
| <b>Revenues</b>                |            |            |              |              |            |
| 5002 Zoning & Subdivision Fees | \$ 20,355  | \$ 16,430  | \$ 20,000    | \$ 20,000    | \$ 18,000  |
| Total Revenue                  | \$ 20,355  | \$ 16,430  | \$ 20,000    | \$ 20,000    | \$ 18,000  |
| <b>Expenses</b>                |            |            |              |              |            |
| 6101 Regular Salaries          | \$ 185,293 | \$ 192,081 | \$ 191,235   | \$ 192,779   | \$ 196,581 |
| 6150 Fringes                   | 72,725     | 79,853     | 78,196       | 78,425       | 83,533     |
| 6305 Awards & Recognition      | -          | -          | 300          | 300          | 300        |
| Total Expense                  | \$ 258,018 | \$ 271,934 | \$ 269,731   | \$ 271,504   | \$ 280,414 |

**DETAILED SUMMARY OF 2018 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Assessing**

**Business Unit 13520**

**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:**

We will perform a City-wide revaluation of all commercial property in 2018. Revaluations are completed at least once every five years to maintain 100% fair market value assessments. Revaluing the 1,700 commercial properties including apartments will require: inspecting properties, researching current listing and sale prices, analyzing assessment/sale price ratios, collecting and analyzing rental income data and income multipliers, applying appropriate replacement values and depreciation, defending the assessments, etc. This revaluation will be performed in-house with limited overtime.

Begin a City-wide revaluation of all 23,500 residential properties for 2019. By year-end 2018 enter new land values, analyze sales, complete the neighborhood ratio analysis, collect and analyze rents, and set about 20% of the new improvement values. This large project was last performed in 2014 and will be completed in-house with no outside help or additional staff needed.

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

Estimated overtime cost for the timely completion of the 2018 City-wide commercial revaluation project is \$3,500. (Actual overtime cost for the 2013 City-wide commercial reval was \$3,340).

**PERFORMANCE INDICATORS**

|   | <u>Actual 2015</u> | <u>Actual 2016</u> | <u>Target 2017</u> | <u>Projected 2017</u> | <u>Target 2018</u> |
|---|--------------------|--------------------|--------------------|-----------------------|--------------------|
| <b>Client Benefits/Impacts</b>                                |                    |                    |                    |                       |                    |
| Equitable assessments and equitable distribution of tax levy: |                    |                    |                    |                       |                    |
| Assessment districts within 10% of market value               | 95%                | 98%                | 98%                | 96%                   | 94%                |
| Coefficient of dispersion of assessment/sale ratios           | 8%                 | 9%                 | 9%                 | 11%                   | 12%                |
| # assessment errors resulting in inaccurate taxes             | 3                  | 1                  | 0                  | 2                     | 0                  |
| <b>Strategic Outcomes</b>                                     |                    |                    |                    |                       |                    |
| Assessments accurately reflect market values:                 |                    |                    |                    |                       |                    |
| Residential class level of assessment                         | 100%               | 98%                | 100%               | 95%                   | 100%               |
| Commercial class level of assessment                          | 99%                | 101%               | 100%               | 97%                   | 100%               |
| Overall level of assessment                                   | 100%               | 99%                | 100%               | 95%                   | 100%               |
| <b>Work Process Outputs</b>                                   |                    |                    |                    |                       |                    |
| % of buildings inspected to update records:                   |                    |                    |                    |                       |                    |
| Commercial new construction                                   | 100%               | 100%               | 100%               | 100%                  | 100%               |
| Residential new construction                                  | 95%                | 95%                | 95%                | 95%                   | 95%                |
| Recent sales  | 48%                | 51%                | 50%                | 43%                   | 40%                |
| Total # of interior inspections                               | 2,667              | 1,601              | 800                | 800                   | 800                |
| Property record maintenance:                                  |                    |                    |                    |                       |                    |
| Deeds processed (ownership changes)                           | 2,439              | 2,568              | 2,300              | 2,500                 | 2,600              |
| Lot splits, CSM's, & new platted parcels                      | 97                 | 134                | 175                | 140                   | 100                |
| Annexed parcel(s)   | 1                  | 2                  | 2                  | 2                     | 2                  |
| Assessments updated   | 700                | 895                | 800                | 1,019                 | 1,600              |

**CITY OF APPLETON 2018 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Assessing**

**Business Unit 13520**

**PROGRAM BUDGET SUMMARY**

| Description                      | Actual            |                   | Budget            |                   |                   |
|----------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                  | 2015              | 2016              | Adopted 2017      | Amended 2017      | 2018              |
| Expenses                         |                   |                   |                   |                   |                   |
| 6101 Regular Salaries            | \$ 371,273        | \$ 377,193        | \$ 374,767        | \$ 376,665        | \$ 383,918        |
| 6105 Overtime                    | 280               | -                 | 507               | 507               | 3,500             |
| 6150 Fringes                     | 131,378           | 143,581           | 139,669           | 139,951           | 148,684           |
| 6201 Training\Conferences        | 1,505             | 1,898             | 2,200             | 2,200             | 1,700             |
| 6302 Subscriptions               | 260               | 343               | 1,100             | 1,100             | 1,100             |
| 6303 Memberships & Licenses      | 330               | 350               | 500               | 500               | 400               |
| 6327 Miscellaneous Equipment     | 1,310             | 1,352             | 2,000             | 2,000             | 1,400             |
| 6413 Utilities                   | 1,441             | 1,440             | 1,440             | 1,440             | 1,440             |
| 6425 CEA Equip. Rental           | 6,953             | 5,017             | 5,243             | 5,243             | 4,560             |
| 6599 Other Contracts/Obligations | 10,958            | 11,620            | 11,600            | 11,600            | 11,700            |
| Total Expense                    | <u>\$ 525,688</u> | <u>\$ 542,794</u> | <u>\$ 539,026</u> | <u>\$ 541,206</u> | <u>\$ 558,402</u> |

**DETAILED SUMMARY OF 2018 PROPOSED EXPENDITURES > \$15,000**

None

| Description                           | 2015 Actual      | 2016 Actual      | 2017 YTD Actual  | 2017 Adopted Budget | 2017 Amended Budget | 2018 Requested Budget | 2018 Adopted Budget |
|---------------------------------------|------------------|------------------|------------------|---------------------|---------------------|-----------------------|---------------------|
| <b>REVENUES</b>                       |                  |                  |                  |                     |                     |                       |                     |
| Charges for Services                  | 831              | 880              | 3,261            | 800                 | 800                 | 800-                  | 800                 |
| Other Revenues                        | 21,857           | 16,430           | 15,215           | 20,000              | 20,000              | 18,000-               | 18,000              |
| <b>TOTAL REVENUES</b>                 | <b>22,688</b>    | <b>17,310</b>    | <b>18,476</b>    | <b>20,800</b>       | <b>20,800</b>       | <b>18,800-</b>        | <b>18,800</b>       |
| <b>EXPENSES BY LINE ITEM</b>          |                  |                  |                  |                     |                     |                       |                     |
| Regular Salaries                      | 1,015,996        | 1,016,190        | 689,774          | 1,168,671           | 1,127,819           | 1,153,886             | 1,153,886           |
| Labor Pool Allocations                | 17,359           | 18,407           | 13,053           | 0                   | 0                   | 0                     | 0                   |
| Overtime                              | 280              | 235              | 1,805            | 507                 | 507                 | 3,500                 | 3,500               |
| Other Compensation                    | 600              | 375              | 500              | 500                 | 500                 | 0                     | 0                   |
| Sick Pay                              | 3,190            | 227              | 0                | 0                   | 0                   | 0                     | 0                   |
| Vacation Pay                          | 123,761          | 115,645          | 89,306           | 0                   | 0                   | 0                     | 0                   |
| Fringes                               | 403,648          | 450,753          | 289,679          | 450,231             | 427,567             | 456,213               | 456,213             |
| <b>Salaries &amp; Fringe Benefits</b> | <b>1,564,834</b> | <b>1,601,832</b> | <b>1,084,117</b> | <b>1,619,909</b>    | <b>1,556,393</b>    | <b>1,613,599</b>      | <b>1,613,599</b>    |
| Training & Conferences                | 7,371            | 8,651            | 11,200           | 12,200              | 12,200              | 12,200                | 9,700               |
| Parking Permits                       | 7,182            | 7,412            | 7,350            | 7,620               | 7,620               | 7,260                 | 7,260               |
| Office Supplies                       | 2,303            | 1,608            | 1,393            | 2,200               | 2,200               | 2,200                 | 2,200               |
| Subscriptions                         | 623              | 691              | 400              | 1,600               | 1,600               | 1,600                 | 1,600               |
| Memberships & Licenses                | 2,439            | 3,231            | 1,395            | 4,425               | 4,425               | 3,600                 | 3,600               |
| Awards & Recognition                  | 270              | 270              | 0                | 1,085               | 1,085               | 570                   | 570                 |
| Food & Provisions                     | 365              | 527              | 389              | 400                 | 400                 | 400                   | 400                 |
| <b>Administrative Expense</b>         | <b>20,553</b>    | <b>22,390</b>    | <b>22,127</b>    | <b>29,530</b>       | <b>29,530</b>       | <b>27,830</b>         | <b>25,330</b>       |
| Books & Library Materials             | 137              | 0                | 0                | 75                  | 75                  | 75                    | 75                  |
| Printing & Reproduction               | 12,356           | 9,903            | 8,430            | 11,800              | 11,800              | 11,800                | 11,800              |
| Miscellaneous Equipment               | 1,310            | 1,352            | 2,133            | 2,200               | 2,200               | 1,600                 | 1,600               |
| <b>Supplies &amp; Materials</b>       | <b>13,803</b>    | <b>11,255</b>    | <b>10,563</b>    | <b>14,075</b>       | <b>14,075</b>       | <b>13,475</b>         | <b>13,475</b>       |
| Consulting Services                   | 17,919           | 22,700           | 209              | 30,000              | 30,000              | 30,000                | 30,000              |
| Advertising                           | 1,933            | 930              | 2,227            | 2,300               | 2,300               | 1,300                 | 1,300               |
| Interpreter Services                  | 0                | 508              | 75               | 500                 | 500                 | 0                     | 0                   |
| Other Contracts/Obligations           | 69,992           | 84,970           | 76,511           | 83,600              | 83,600              | 83,700                | 83,700              |
| <b>Purchased Services</b>             | <b>89,844</b>    | <b>109,108</b>   | <b>79,022</b>    | <b>116,400</b>      | <b>116,400</b>      | <b>115,000</b>        | <b>115,000</b>      |
| Telephone                             | 1,046            | 1,051            | 1,418            | 1,332               | 1,332               | 1,332                 | 1,332               |
| Cellular Telephone                    | 2,788            | 2,961            | 1,985            | 2,880               | 2,880               | 2,880                 | 2,880               |
| <b>Utilities</b>                      | <b>3,834</b>     | <b>4,012</b>     | <b>3,403</b>     | <b>4,212</b>        | <b>4,212</b>        | <b>4,212</b>          | <b>4,212</b>        |
| CEA Equipment Rental                  | 6,953            | 5,017            | 2,359            | 5,243               | 5,243               | 4,560                 | 4,560               |
| <b>Repair &amp; Maintenance</b>       | <b>6,953</b>     | <b>5,017</b>     | <b>2,359</b>     | <b>5,243</b>        | <b>5,243</b>        | <b>4,560</b>          | <b>4,560</b>        |
| Capital Expenditures                  | 0                | 0                | 0                | 0                   | 0                   | 0                     | 0                   |
| <b>TOTAL EXPENSES</b>                 | <b>1,699,821</b> | <b>1,753,614</b> | <b>1,201,591</b> | <b>1,789,369</b>    | <b>1,725,853</b>    | <b>1,778,676</b>      | <b>1,776,176</b>    |