

**CITY OF APPLETON 2020 BUDGET**

**COMMUNITY & ECONOMIC DEVELOPMENT**

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

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

# CITY OF APPLETON 2020 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 2019 EVENTS

- \* Industrial development saw a continued increase in 2019. New Morning Coffee Roasters purchased 4.21 acres in Southpoint Commerce Park and an additional four purchase contracts were approved by the Common Council totaling 89.25 acres. Becknell Industrial completed construction of their 200,000 square foot warehouse building in 2019 that will be leased to Veritiv. The City repurchased 1.44 acres in the Northeast Business Park from Onstage Audio, giving the City additional inventory in that area. Another contract is pending for 2.92 acres in the Northeast Business Park.
- \* Staff continued collaboration with US Venture to construct their headquarters on Bluff Site 1 as well as Commercial Horizons on the proposed mixed-use library and mixed use development for Soldiers Square Ramp area and Bluff Site 2. Staff also continued to work with Milwaukee View on their redevelopment of the historic Zuelke Building.
- \* Downtown Appleton saw the announcement and commencement 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. These projects included the historic renovation and new construction of Gabriel Lofts (21 units), new construction by Tadyach Investments on the former Northshore Bank Building property (28 units), and new construction for Avant Apartments LLC (36 units) just north of the Heid Music property along Durkee and Washington Streets. All three of these projects are anticipated at market rate rents. The proposal for historic preservation and redevelopment at the Appleton Post-Crescent property at 306 W. Washington was also announced in July, 2019 with the anticipation of another 60+ units at affordable rental rates per the WHEDA tax credit program.
- \* 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.
- \* Implementation of the Comprehensive Plan continued in 2019, with highlights that include increased mixed-use and residential development in downtown and along the Fox River, utilizing CBD zoning in other areas of the City, new growth and officially mapped roadways on the north side, and assigning names to alleys.
- \* Staff partnered with 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 are expected to be completed by the end of 2019.
- \* Staff continued to work intently with the developer, Appleton Storage I, LLC, to bring development to the former Kmart 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 CSM were submitted in 2019.
- \* To promote historic preservation efforts, staff drafted and presented changes to the Historic Preservation Ordinance in response to Wisconsin State Statute Amendments pursuant to 2015 Wisconsin Act 176 and 2017 Wisconsin Act 317. Also, the Historic Preservation Commission recommended approval of the Appleton Post-Crescent Building to the National Register of Historic Places. When this building is officially listed on the National Register of Historic Places, this property would be entitled to the benefits and protection of the National Historic Preservation Act of 1966.
- \* A Citywide Revaluation of all 23,000 residential properties (1 - 3 family homes) was successfully completed. We revalue all property to 100% of market value at least once every five years to re-establish equity. Since the 2014 revaluation, home sale prices had increased greatly, thereby requiring assessment increases in the range of 20% for many properties. Project steps included rental data collection, sales validation, statistical analysis, computerized modeling, public relations, and the individual review of all 23,000 values. This large project was completed in-house with little overtime.
- \* The City's equalized value increased by 7.57% in 2019 from \$5,443,435,200 to \$5,855,356,700 ahead of the Statewide gain of 5.72%.
- \* Business enhancement grants from TIF District #12 were fully utilized in 2019 with \$42,000 awarded, while TIF District #11 is accepting final applications for the balance of the \$42,000 after committing \$28,000 by July, 2019. These funds leveraged another \$206,388 in private investment.
- \* During the first half of 2019, the site plan review team has approved approximately 21 multi-family dwelling units, 43,000 square feet of industrial space, 8,300 square feet of commercial space, and 13,800 square feet of institutional space.
- \* Staff facilitated and approved the Spartan Drive/Meade Street, Lucht, and Cypress Homes annexations, resulting in roughly 8.6 acres of land being annexed.
- \* The City had approximately 239 single family residential lots platted and available for sale starting in 2019. Final plat approval resulted in the recording of an additional 123 residential lots, including Apple Ridge and North Edgewood Estates. The City still has several acres of planned, unplatted land available for single family development.
- \* 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.
- \* The GIS team continues to expand and implement the use of GIS tools for field use. All older applications have been upgraded to the latest mobile technology allowing users to access new tools and functionality while in the process of collecting data in the field. Additionally, many new applications are being developed to streamline the workflow from the field to the office.
- \* 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 West Appleton Neighborhood was granted funding through the Neighborhood Grant Program to support a neighborhood survey, launch event, and back to school event.
- \* The newly formed Appleton Public Arts Committee has begun meeting and is excited for the opportunity to review upcoming projects.

## CITY OF APPLETON 2020 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

### MAJOR 2020 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 four acres of business park land.
- \* Continue the on-going process of a comprehensive re-write of the Zoning Ordinance and amendment 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, 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 enhancing existing mobile applications, creating new applications, utilizing ArcGIS online as well as creating access for smartphones and tablets. Utilize upgraded server/software structure to better organize our external web applications and allow for more "real-time" updates to GIS data.
- \* Create efficiencies by fully implementing new assessment software. New on-line scheduling software will be made available to the public this fall to reduce incoming phone calls to the Assessor's office. In addition, we will be implementing the more advanced features of our 2017 mass appraisal system. These advanced features, including the mobile data collection and commercial pricing applications, will create efficiencies and data consistency.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			% Change *
		2017	2018	Adopted 2019	Amended 2019	2020	
Unit	Title						
<b>Program Revenues</b>		\$ 20,870	\$ 20,030	\$ 18,350	\$ 18,350	\$ 18,350	0.00%
<b>Program Expenses</b>							
15010	Administration	525,860	508,685	575,958	575,958	585,949	1.73%
15020	Planning	273,584	279,651	282,978	282,978	278,125	-1.71%
15030	Marketing	173,459	149,586	141,658	158,183	143,819	1.53%
15040	New & Redevelopment	182,186	185,288	212,456	241,479	215,995	1.67%
15050	Assessing	566,540	567,128	578,599	578,599	590,080	1.98%
<b>TOTAL</b>		\$ 1,721,629	\$ 1,690,338	\$ 1,791,649	\$ 1,837,197	1,813,968	1.25%
<b>Expenses Comprised Of:</b>							
	Personnel	1,582,063	1,588,176	1,662,680	1,662,680	1,685,250	1.36%
	Training & Travel	22,567	15,764	17,000	17,000	16,800	-1.18%
	Supplies & Materials	23,113	17,984	24,289	24,289	24,289	0.00%
	Purchased Services	93,886	68,414	87,680	133,228	87,629	-0.06%
<b>Full Time Equivalent Staff:</b>							
	Personnel allocated to programs	16.81	16.87	16.97	16.97	16.97	

**CITY OF APPLETON 2020 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.

As GIS continues to expand and more users are working with tools and applications, the need to support these users continues to grow. The new performance measurement below was introduced to accurately capture the number of users GIS staff supports each year.

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 2017</u>	<u>Actual 2018</u>	<u>Target 2019</u>	<u>Projected 2019</u>	<u>Target 2020</u>
<b>Client Benefits/Impacts</b>					
Employee retention					
% staff turnover	6%	0%	0%	0%	0%
Accurate and useful information					
# of layers edited (GIS)	1,080	975	800	800	800
<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 measurement →			250	500
<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	471	460	250	250	250

**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Administration**

**Business Unit 15010**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2017	2018	Adopted 2019	Amended 2019	2020
<b>Revenues</b>					
480100 General Charges for Service	\$ 3,445	\$ 605	\$ 350	\$ 350	\$ 350
Total Revenue	<u>\$ 3,445</u>	<u>\$ 605</u>	<u>\$ 350</u>	<u>\$ 350</u>	<u>\$ 350</u>
<b>Expenses</b>					
610100 Regular Salaries	\$ 334,064	\$ 337,433	\$ 374,617	\$ 374,617	\$ 381,373
610500 Overtime Wages	1,088	1,448	-	-	-
615000 Fringes	145,153	137,710	161,247	161,247	164,482
620100 Training/Conferences	12,928	6,903	8,240	8,240	8,240
620600 Parking Permits	7,350	7,260	7,260	7,260	7,260
630100 Office Supplies	2,287	1,949	2,244	2,244	2,244
630200 Subscriptions	400	543	500	500	500
630300 Memberships & Licenses	2,310	3,012	3,200	3,200	3,200
630500 Awards & Recognition	256	181	270	270	270
630700 Food & Provisions	409	400	450	450	450
631500 Books & Library Materials	143	-	75	75	75
632001 City Copy Charges	13,178	8,200	13,550	13,550	13,550
632002 Outside Printing	527	804	-	-	-
632700 Miscellaneous Equipment	158	-	200	200	200
641200 Advertising	2,871	1,104	1,333	1,333	1,333
641307 Telephone	1,603	734	1,332	1,332	1,332
641308 Cellular Phones	1,135	1,004	1,440	1,440	1,440
Total Expense	<u>\$ 525,860</u>	<u>\$ 508,685</u>	<u>\$ 575,958</u>	<u>\$ 575,958</u>	<u>\$ 585,949</u>

**DETAILED SUMMARY OF 2020 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2020 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 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 statutory elements of the comprehensive plan.
- \* Provide expertise and technical assistance in administering the City's neighborhood program including

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

The projected # of historic sites, buildings, districts recognized/researched (below) was unusually high for 2018 with the creation of a new website - Appleton's Historic Building Survey - with over 150 properties available for public access.

A performance indicator was added to track public art projects that will be reviewed by the newly created Appleton Public Art Committee.

**PERFORMANCE INDICATORS**

	<u>Actual 2017</u>	<u>Actual 2018</u>	<u>Target 2019</u>	<u>Projected 2019</u>	<u>Target 2020</u>
<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%	0%	0%	0%
% of complaints received on commission applications	0%	0%	0%	0%	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	17	48	20	35	30
# of comp plan goals and objectives implemented	50	73	40	60	40
<b>Work Process Outputs</b>					
Services performed					
# of admin applications approved	455	353	425	425	425
# of commission applications approved	47	47	25	40	30
# of customers inquiries served	1,312	1,319	900	1,050	900
# of comp plan and ordinance amendments adopted	3	4	2	2	2
# of historic sites, buildings, districts recognized/researched	0	150	2	3	2
# of public art projects reviewed	New measure			6	3

**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Planning**

**Business Unit 15020**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2017	2018	Adopted 2019	Amended 2019	2020
<b>Revenues</b>					
500200 Zoning & Subdivision Fees	\$ 17,425	\$ 19,425	\$ 18,000	\$ 18,000	\$ 18,000
<b>Total Revenue</b>	<b>\$ 17,425</b>	<b>\$ 19,425</b>	<b>\$ 18,000</b>	<b>\$ 18,000</b>	<b>\$ 18,000</b>
<b>Expenses</b>					
610100 Regular Salaries	\$ 190,254	\$ 196,393	\$ 195,645	\$ 195,645	\$ 207,479
615000 Fringes	83,330	83,246	87,033	87,033	70,346
620100 Training/Conferences	-	12	-	-	-
630500 Awards & Recognition	-	-	300	300	300
<b>Total Expense</b>	<b>\$ 273,584</b>	<b>\$ 279,651</b>	<b>\$ 282,978</b>	<b>\$ 282,978</b>	<b>\$ 278,125</b>

**DETAILED SUMMARY OF 2020 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2020 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 "% increase in Net New Construction" is a new measure for 2020, replacing the % increase in equalized value. This measurement directly impacts the City's ability to levy taxes to provide programs and services and it has been featured in the City's Growth Report each year. Observation of the net new construction trend, along with other community metrics, are important for long-term vitality of the City.

The number of existing and start-up businesses assisted each year has been combined into "# of businesses assisted" (below) for efficient reporting purposes.

**PERFORMANCE INDICATORS**

	<u>Actual 2017</u>	<u>Actual 2018</u>	<u>Target 2019</u>	<u>Projected 2019</u>	<u>Target 2020</u>
<b>Client Benefits/Impacts</b>					
Connection to source of issue resolution or resource # businesses assisted	75	65	75	63	75
Information specific to development in Appleton # of prospects information deliveries	37	33	70	42	70
<b>Strategic Outcomes</b>					
Appleton's economy grows and tax base enhanced % increase in net new construction	1.46%	1.58%	1.62%	1.35%	1.75%
<b>Work Process Outputs</b>					
Retention visit clients served # business retention visits/follow-ups	47	46	40	40	40



**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 15030**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2017	2018	Adopted 2019	Amended 2019	2020
Expenses					
610100 Regular Salaries	\$ 67,331	\$ 67,434	\$ 78,503	\$ 78,503	\$ 80,021
611500 Vacation Pay	9,428	11,368	-	-	-
615000 Fringes	27,553	26,309	27,155	27,155	27,798
643100 Interpreter Services	75	-	-	-	-
659900 Other Contracts/Obligation	69,072	44,475	36,000	52,525	36,000
Total Expense	<u>\$ 173,459</u>	<u>\$ 149,586</u>	<u>\$ 141,658</u>	<u>\$ 158,183</u>	<u>\$ 143,819</u>

**DETAILED SUMMARY OF 2020 PROPOSED EXPENDITURES > \$15,000**

Other Contracts/Obligations

Economic development projects and initiatives	\$ 36,000
	<u>\$ 36,000</u>

**CITY OF APPLETON 2020 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:**

With the completion of extended Milis Drive and Vantage Drive and associated infrastructure, all areas west of Eisenhower Drive are "fully improved" in Southpoint Commerce Park. This budget reporting category has been adjusted to reflect a sum total of all improved parcels the City has available for sale in the business parks.

**PERFORMANCE INDICATORS**

	<u>Actual 2017</u>	<u>Actual 2018</u>	<u>Target 2019</u>	<u>Projected 2019</u>	<u>Target 2020</u>
<b>Client Benefits/Impacts</b>					
Assist in land assembly, development incentives, or project management					
# developments generated via direct management	3	9	5	6	5
# of improved business park acres	173	170	166	159	117
<b>Strategic Outcomes</b>					
Tax base enhanced					
\$ increase industrial/commercial	\$ 55,297,580	\$ 35,565,603	\$ 14,000,000	\$ 15,100,000	\$ 44,000,000
\$ increase in target districts	\$ 24,717,932	\$ 20,103,231	\$ 4,000,000	\$ 10,000,000	\$ 34,000,000
\$ business park permits	\$ 7,943,431	\$ 13,819,431	\$ 2,000,000	\$ 2,500,000	\$ 24,000,000
<b>Work Process Outputs</b>					
# of development agreements completed	2	5	2	5	2
# of acres sold in business park	7	14.6	4	44.0	4

**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**New and Redevelopment Projects**

**Business Unit 15040**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2017	2018	Adopted 2019	Amended 2019	2020
Expenses					
610100 Regular Salaries	\$ 131,334	\$ 134,212	\$ 133,698	\$ 133,698	\$ 136,123
615000 Fringes	48,783	46,672	48,758	48,758	49,872
640400 Consulting Services	2,069	4,404	30,000	59,023	30,000
<b>Total Expense</b>	<b>\$ 182,186</b>	<b>\$ 185,288</b>	<b>\$ 212,456</b>	<b>\$ 241,479</b>	<b>\$ 215,995</b>

**DETAILED SUMMARY OF 2020 PROPOSED EXPENDITURES > \$15,000**

**Consulting Services**

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

\$ 30,000  
\$ 30,000

**CITY OF APPLETON 2020 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:**

Create efficiencies by fully implementing new assessment software. New on-line scheduling software will be made available to the public this fall to reduce incoming phone calls to the Assessor's office. In addition, we will be implementing the more advanced features of our new mass appraisal system. These advanced features, including the mobile data collection and commercial pricing applications, will create efficiencies and consistency.

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

Funding for overtime has been reduced for 2020 as there is not a revaluation process for Assessor staff to complete in 2020. Future revaluation years will include a request for additional overtime to support the level of work needed for the revaluation process.

**PERFORMANCE INDICATORS**

	<u>Actual 2017</u>	<u>Actual 2018</u>	<u>Target 2019</u>	<u>Projected 2019</u>	<u>Target 2020</u>
<b>Client Benefits/Impacts</b>					
Equitable assessments and equitable distribution of tax levy:					
Assessment districts within 10% of market value	96%	52%	100%	100%	100%
Coefficient of dispersion of assessment/sale ratios	11%	13%	8%	8%	10%
# assessment errors resulting in inaccurate taxes	2	3	0	0	0
<b>Strategic Outcomes</b>					
Assessments accurately reflect market values:					
Residential class level of assessment	94%	90%	100%	100%	100%
Commercial class level of assessment	96%	95%	100%	100%	100%
Overall level of assessment	95%	90%	100%	100%	100%
<b>Work Process Outputs</b>					
% of buildings inspected to update records:					
Commercial new construction	100%	100%	100%	100%	100%
Residential new construction	95%	87%	85%	85%	85%
Recent sales	43%	25%	25%	25%	35%
Total # of interior inspections	952	604	650	650	900
Property record maintenance:					
Deeds processed (ownership changes)	2,489	2,617	2,500	2,200	2,300
Lot splits, CSM's, & new platted parcels	160	227	200	240	230
Annexed parcel(s)	-	11	4	4	5
Assessments updated	1,019	1,613	20,000	20,000	900

**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Assessing**

**Business Unit 15050**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2017	2018	Adopted 2019	Amended 2019	2020
Expenses					
610100 Regular Salaries	\$ 386,093	\$ 395,137	\$ 395,487	\$ 395,487	\$ 405,563
610500 Overtime Wages	1,300	2,476	3,800	3,800	1,300
615000 Fringes	156,354	148,336	156,737	156,737	160,893
620100 Training/Conferences	2,289	1,589	1,500	1,500	1,300
630200 Subscriptions	1,100	1,205	1,700	1,700	1,700
630300 Memberships & Licenses	370	330	400	400	400
632700 Miscellaneous Equipment	1,974	1,360	1,400	1,400	1,400
641308 Cellular Phones	1,440	1,441	1,440	1,440	1,440
642501 CEA Operations/Maint.	1,430	1,540	2,641	2,641	2,409
642502 CEA Depreciation/Replace.	2,512	1,763	1,594	1,594	1,575
659900 Other Contracts/Obligation	11,678	11,951	11,900	11,900	12,100
<b>Total Expense</b>	<b>\$ 566,540</b>	<b>\$ 567,128</b>	<b>\$ 578,599</b>	<b>\$ 578,599</b>	<b>\$ 590,080</b>

**DETAILED SUMMARY OF 2020 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2020 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

	2017 ACTUAL	2018 ACTUAL	2019 YTD ACTUAL	2019 ORIG BUD	2019 REVISED BUD	2020 BUDGET
<b>Charges for Services</b>						
480100 General Charges for Service	3,445	605	9	350	350	350
500200 Zoning & Subdivision Fees	17,425	19,425	6,350	18,000	18,000	18,000
<b>TOTAL PROGRAM REVENUES</b>	<b>20,870</b>	<b>20,030</b>	<b>6,359</b>	<b>18,350</b>	<b>18,350</b>	<b>18,350</b>
<b>Salaries</b>						
610100 Regular Salaries	977,498	991,525	333,454	1,177,450	1,177,450	1,210,059
610200 Labor Pool Allocations	18,655	16,565	6,647	-	-	-
610500 Overtime Wages	2,387	3,924	1,006	3,800	3,800	1,300
611000 Other Compensation	500	500	500	500	500	500
611400 Sick Pay	-	1,973	-	-	-	-
611500 Vacation Pay	121,850	131,416	35,160	-	-	-
615000 Fringes	461,173	442,273	148,622	480,930	480,930	473,391
<b>TOTAL PERSONNEL</b>	<b>1,582,063</b>	<b>1,588,176</b>	<b>525,389</b>	<b>1,662,680</b>	<b>1,662,680</b>	<b>1,685,250</b>
<b>Training~Travel</b>						
620100 Training/Conferences	15,217	8,504	3,274	9,740	9,740	9,540
620600 Parking Permits	7,350	7,260	6,501	7,260	7,260	7,260
<b>TOTAL TRAINING / TRAVEL</b>	<b>22,567</b>	<b>15,764</b>	<b>9,775</b>	<b>17,000</b>	<b>17,000</b>	<b>16,800</b>
<b>Supplies</b>						
630100 Office Supplies	2,287	1,949	174	2,244	2,244	2,244
630200 Subscriptions	1,500	1,748	357	2,200	2,200	2,200
630300 Memberships & Licenses	2,680	3,342	710	3,600	3,600	3,600
630500 Awards & Recognition	256	181	-	570	570	570
630700 Food & Provisions	409	400	-	450	450	450
631500 Books & Library Materials	143	-	-	75	75	75
632001 City Copy Charges	13,178	8,200	1,838	13,550	13,550	13,550
632002 Outside Printing	527	804	-	-	-	-
632700 Miscellaneous Equipment	2,133	1,360	1,380	1,600	1,600	1,600
<b>TOTAL SUPPLIES</b>	<b>23,113</b>	<b>17,984</b>	<b>4,459</b>	<b>24,289</b>	<b>24,289</b>	<b>24,289</b>
<b>Purchased Services</b>						
640400 Consulting Services	2,069	4,404	26,166	30,000	59,023	30,000
641200 Advertising	2,871	1,104	-	1,333	1,333	1,333
641307 Telephone	1,603	734	312	1,332	1,332	1,332
641308 Cellular Phones	2,576	2,443	715	2,880	2,880	2,880
642501 CEA Operations/Maint.	1,430	1,540	121	2,641	2,641	2,409
642502 CEA Depreciation/Replace.	2,512	1,763	403	1,594	1,594	1,575
643100 Interpreter Services	75	-	-	-	-	-
659900 Other Contracts/Obligation	80,750	56,426	34,454	47,900	64,425	48,100
<b>TOTAL PURCHASED SVCS</b>	<b>93,886</b>	<b>68,414</b>	<b>62,171</b>	<b>87,680</b>	<b>133,228</b>	<b>87,629</b>
<b>TOTAL EXPENSE</b>	<b>1,721,629</b>	<b>1,690,338</b>	<b>601,794</b>	<b>1,791,649</b>	<b>1,837,197</b>	<b>1,813,968</b>