



# City of Appleton Finance Department Strategic Plan

**Mission:** In order to meet program delivery objectives, assure compliance with government policies, and safeguard the assets of the City, we will provide financial management, billing, and collection services

**Community Values:**  
 Quality Education  
 Recreational Opportunities  
 Safe, healthy, accepting environment  
 Welcoming and family-oriented  
 Strong and balanced economy

**Vision:** Appleton is a welcoming partner in a vibrant, diverse, well-planned, collaborative regional community that embraces neighborhood values.

## Planning Assumptions

Workforce is changing (internal—retirements; external—competition for skilled and talented employees)

Increased utilization and dependency on technology

State and federal funding decline

Demographics of our community will continue to change

Imbalance of service demands versus available resources

Why and how people work will change

Increasing demand for transparency and response

Increased rate of change

## Key Strategies:

- 1) Determine and communicate City priorities and allocate resources accordingly.
- 2) Proactively pursue collaboration and cooperative agreements to meet the needs of our community.
- 3) Embrace a culture of continuous improvement.
- 4) Attract and retain an inspired, engaged workforce.
- 5) Increase visibility, accessibility, transparency and marketing in communication.
- 6) Encourage sustainability.
- 7) Embrace diversity and inclusion within our organization.

## Operational Plans:

- Adjust or completely eliminate the City Tax Levy Ordinance to remove conflict with State restrictions
- Promote accountability for time-lines established, continue efforts to make the budget document more user friendly
- Promote payment by procurement card to any vendors that accept payment and increase collaborative rebate program
- Facilitate grants to non-profits in the community promoting joint applications that avoid duplication of services
- Analyze financial aspects of development projects throughout the City
- Continue and/or expand short-term cash flow collaboration with other governmental units
- Continuously seek out and utilize cooperative purchasing agreements to increase efficiency and reduce costs Citywide
- Promote direct face to face feedback among staff members when feasible
- Inform applicable parties of items that affect their work flow responsibilities within 48 hours of receiving notification of an issue
- Director contact with first floor Finance Department staff at least once a week/Monthly "News and Notes Updates" to staff
- Develop and maintain a current succession plan
- Keep operations manual current/rotation of staff duties to maintain internal controls and trained back-ups ready to step in
- Provide training opportunities for continued personal and professional growth/development of employees
- Delegate work to most cost-effective level capable of performing the duties
- Complete annual staff performance reviews recognizing accomplishments, identifying areas of improvement, and setting job goals
- Work with Information Technology to expand use of document archiving and imaging
- Provide centralized accounting services to City Departments to verify public purpose and compliance
- Assist and encourage City departments to specify, identify and procure sustainable goods and services whenever feasible
- Continue to investigate long-term options for replacing the I-series based financial systems
- Analyze all revenue collection points for the City and investigate the feasibility of incorporating credit card payments, using one vendor to reduce costs
- Provide administration of the city's collection and payment functions to insure funds are available to provide maximum services to the public while maintaining adequate cash flow
- Consult with Diversity Coordinator to provide knowledgeable, courteous customer service to all individuals
- Improve outreach and provide opportunities for minority and women-owned companies to compete for City business