



## Meeting Agenda - Final-revised Community & Economic Development Committee

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Wednesday, October 26, 2016

5:00 PM

Council Chambers, 6th Floor

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1. Call meeting to order
2. Roll call of membership
3. Approval of minutes from previous meeting  
[16-1642](#) CEDC Minutes from 10-5-16  
**Attachments:** [CEDC Minutes 10-5-16.pdf](#)
4. **Public Hearings/Apearances**
5. **Action Items**  
[16-1643](#) Request to approve 2017 Community Development Block Grant (CDBG) Community Partner Allocation Recommendations  
**Attachments:** [Alloc Recs Memo to CEDC 10-26-16 mtg.pdf](#)  
[CDBG Advisory Board Members 10-26-16 mtg.pdf](#)  
  
**16-1719** The Community and Economic Development Committee may go into closed session according to State Statute 19.85(1)(e) for the purpose of deliberating or discussing the sale and/or purchase terms of property within the City of Appleton's Northeast Industrial Park and then will reconvene into open session
6. **Information Items**  
[16-1644](#) 2017 Community & Economic Development Department Budget  
**Attachments:** [2017 CEDC Budget.pdf](#)  
[2017 Housing & Community Development Grants Budget.pdf](#)  
[2017 Capital Projects Budget.pdf](#)  
[2017 Tax Incremental Financing Districts Budget.pdf](#)  
[2017 CIP Appleton Redevelopment Authority Budget.pdf](#)  
[2017 CIP TIF #6-IPLF - Southpoint Commerce Park Budget.pdf](#)

[16-1645](#)

Huntley Elementary Newsletter including a "thank you" regarding the playground

**Attachments:** [Huntley News Oct 2016.pdf](#)

[Huntley Playground Picture #1.pdf](#)

[Huntley Playground Picture #2.pdf](#)

[Huntley Playground Picture #3.pdf](#)

[Huntley Playground Picture #4.pdf](#)

## 7. Adjournment

*Notice is hereby given that a quorum of the Common Council may be present during this meeting, although no Council action will be taken.*

*Any questions about items on this meeting are to be directed to Karen Harkness, Director, Community and Economic Development Department at 920-832-6468.*

*Reasonable Accommodations for Persons with Disabilities will be made upon Request and if Feasible.*



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
[www.appleton.org](http://www.appleton.org)

## Meeting Minutes - Final Community & Economic Development Committee

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Wednesday, October 5, 2016

6:15 PM

Council Chambers, 6th Floor

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### SPECIAL

1. Call meeting to order

**Meeting called to order at 6:16 p.m.**

2. Roll call of membership

**Present:** 5 - Coenen, Baranowski, Mann, Reed and Siebers

3. Approval of minutes from previous meeting

[16-1527](#)

CEDC Minutes from 9-28-16

**Attachments:** [CEDC Minutes 9-28-16.pdf](#)

**Reed moved, seconded by Baranowski, that the Minutes be approved. Roll Call. Motion carried by the following vote:**

**Aye:** 5 - Coenen, Baranowski, Mann, Reed and Siebers

4. Public Hearings/Appealances

5. Action Items

[16-1528](#)

**\*\*CRITICAL TIMING\*\*** Request to approve the Offer to Purchase from Onstage Audio, LLC to purchase Lot 4, Northeast Industrial Park Plat 4 for a price of \$50,000.00 (\$34,722.22 per acre), comprised of approximately 1.44 acres, be countered to reflect a purchase price of \$52,992.00 (\$36,800.00 per acre) and amend Lines 287 and 293 as referenced in the attached memo

**Attachments:**     [Onstage Audio OTP Memo 9-30-16.pdf](#)  
                              [Onstage Audio Offer to Purchase - Parcel 1-5362.pdf](#)  
                              [Bldg rendering.pdf](#)  
                              [Goodland Drive Utilities.pdf](#)  
                              [Northeast Industrial Park Plat 4.pdf](#)  
                              [AvailableSites 9-30-16.pdf](#)

**Baranowski moved, seconded by Siebers, that the Report Action Item be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 5 - Coenen, Baranowski, Mann, Reed and Siebers

[16-1529](#)

The Community and Economic Development Committee may go into closed session pursuant to State Statute 19.85(1)(e) for real estate negotiations regarding Lot 4 in the Northeast Industrial Park Plat 4 and then reconvene into open session

**The Community and Economic Development Committee did not go into closed session.**

**6. Information Items**

**7. Adjournment**

**Baranowski moved, seconded by Mann, that the meeting be adjourned at 6:19 p.m. Roll Call. Motion carried by the following vote:**

**Aye:** 5 - Coenen, Baranowski, Mann, Reed and Siebers





# MEMORANDUM

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“...meeting community needs...enhancing quality of life.”

TO: Community and Economic Development Committee  
FROM: Nikki Gerhard, Community Development Specialist  
DATE: October 26, 2016  
RE: Recommendations for 2017 Community Development Block Grant Funding

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**Background.** The estimated 2017 CDBG award listed in the 2017 City budget was \$528,000. This amount was estimated based on past award amounts. Staff determined the allocations for the Homeowner Rehabilitation Loan Program, Neighborhood Services Program, Appleton Housing Authority and administrative costs. The remaining amount was designated for department projects and community partners through a competitive application process.

**Application Information.** CDBG applications from City Departments were due to the Community and Economic Development Department on September 2, 2016. One application was submitted and was recently approved for the full request. CDBG applications from community partners for the 2017 program year were due to the Community and Economic Development Department on September 29, 2016. Fifteen applications were submitted. Upon receipt, the applications were thoroughly reviewed by the Community and Economic Development Specialist for eligibility under HUD program regulations, and it was determined that all were eligible.

After awards were allocated for City programs, administration, and the City Department project, the amount available to allocate to the community partner applicants was \$137,586. Of the fifteen applications, nine fell under the “public service” activity definition. Only 15% of a grantee’s allocation may be used for public service activities, per HUD rules. In this instance, only a maximum of \$79,200 can be allocated towards the public service applications. The total amount requested by applicants whose activities were not considered public services was \$362,329.

**Application Review.** The CDBG Advisory Board will be meeting on October 25, 2016. (See attachment for information regarding Board membership.) Members were asked to review the applications and decide upon allocation amounts prior to the meeting. The allocation amounts made by each board member will be compiled and discussed at the meeting. Allocation recommendations will be agreed upon pursuant to the CEDC meeting on October 26, 2016.

**Allocation Approval.** The funding allocation recommendations from the CDBG Advisory Board for community partners will be presented for CEDC approval at the meeting.

If you have any questions, please contact me at 832-6469 or [nikki.gerhard@appleton.org](mailto:nikki.gerhard@appleton.org). Thank you!

## 2017 CDBG ADVISORY BOARD MEMBERSHIP

The membership of the CDBG Advisory Board is provided for in the City's CDBG Policy and is as follows:

*This Board will consist of the following members:*

1. *Mayor*
2. *Common Council President*
3. *Chairperson of the Community and Economic Development Committee or committee designee*
4. *Chairperson of the Appleton Redevelopment Authority or committee designee*
5. *Representative from an Experienced Outside Funding Agency – on a rotating basis (i.e. United Way, Community Foundation, JJ Keller Foundation, U.S. Oil Basic Needs Partnership)*
6. *Citizen member from the City Plan Commission*

The members of the CDBG Advisory Board this year:

1. Mayor Tim Hanna
2. Ald. Kathleen Plank, Common Council President
3. Ald. Patti Coenen, CEDC Chairperson
4. Marissa Downs, ARA Chairperson
5. Becky Boulanger, Executive Director for the Women's Fund
6. Steve Usabar, City Plan Commission member

## **CITY OF APPLETON 2017 BUDGET**

### **COMMUNITY & ECONOMIC DEVELOPMENT**

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

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

## CITY OF APPLETON 2017 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

### MISSION STATEMENT

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

### DISCUSSION OF SIGNIFICANT 2016 EVENTS

In 2016, the Community and Economic Development Department continued to deliver services to the public with a focus on meeting the community needs and enhancing quality of life.

\* Industrial development saw a continued increase in 2016 with the sale of two lots in the Northeast Business Park. Land sales totaling 3.61 acres in the Northeast Business Park resulted in a total sale price of \$133,550. 7.32 acres were sold in Southpoint for the new Encapsys headquarters which is scheduled to break ground in October.

\* Continued efforts to construct the Exhibition Center with a focus on communication with other nine municipalities, the ARA, the Exhibition Center Advisory Committee and the Hotel Room Tax Commission creating by-laws and policies.

\* 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.

\* Staff worked with a consultant team to update the Comprehensive Plan (previously adopted in 2010) and complete an in-depth rewrite of its downtown plan chapter with an intensive public engagement process that included online and in-person activities.

\* A new Assessor software system was selected to replace the aging iSeries assessor property system. This followed a six month RFP process and the clean-up preparation of many data fields within the City's 26,000 property records. Two out of the four phases of this large software installation/conversion project will be completed by December.

\* The City's equalized value increased by 2.5% in 2016 from \$4,816,754,800 to \$4,938,725,300. This 2.5% growth exceeded many cities of similar size including Green Bay, Oshkosh, Fond du Lac and Sheboygan. All TIDs in the City increased in equalized value for 2016.

\* In May, to promote historic preservation efforts, the City of Appleton Historic Preservation Commission hosted a public workshop at the Appleton Public Library on home and building genealogy. The home genealogy workshop taught citizens how to best use the Appleton Library and History Museum's collections of published and unpublished materials, including maps, city directories, photographs, newspapers, books and databases for researching home and building histories and its former residents as well as the newest online products for historical and genealogical research.

\* In 2016, to promote historic preservation efforts, the City of Appleton Historic Preservation Commission created bookmarks of five existing memorial monuments in Appleton. They wrote a historic narrative for each memorial explaining its historic significance and photographs were taken of the memorials. The department contracted with a professional printer to produce the bookmarks for distribution to the public.

\* On May 5, 2016, the Appleton Woolen Mill building located at 218 East South Island Street was listed on the State of Wisconsin and National Register of Historic Places. This property is entitled to the benefits and protection of the National Historic Preservation Act of 1966, as amended and under Chapter 44, Wisconsin State Statutes. The Appleton Woolen Mill building is the 13th individual building in Appleton listed on the State of Wisconsin and National Register of Historic Places.

\* During the first half of 2016, the site plan review committee has approved 60 multi-family dwelling units, approximately 25,000 square feet of office space, 22,000 square feet of industrial space and 2,000 square feet of commercial space.

\* In the annual growth report, the City had approximately 232 single family residential lots platted and available for sale starting 2016. Final plat approval resulted in the creation of an additional thirteen residential lots. The City still has several acres of planned, unplatted land available for single family development.

\* In 2016, Appleton's GIS team continued to develop the GeoEvent Software and produced garbage and snow operations web sites to allow real time and historical data on fleet movement. Collector for ARCGIS was rolled out for a new water maintenance project as well as conversion of the tree inventory to an IOS platform (IPad). A customized tool was created for the Fire Department allowing the download of GIS buildings and action line data for pre-plan drawings in their Fire Zone software, saving hundreds of hours of time and reducing a duplication of efforts. The Fox Trot Trail map, brochure and app was created in collaboration with multiple departments.

\* We embrace diversity and inclusion as an organization to support a welcoming and inclusive community. Appleton is now seen as a leader for its work with refugee resettlement. In 2015 and 2016, we had visits from the State of Wisconsin Office of Refugees along with the Chief of Domestic Resettlement, Refugee Admissions Bureau of Population, Refugees, and Migration with the federal Department of State. Our refugee resettlement taskforce continues to help identify gaps and barriers for refugee facilities seeking service.

\* We sought to improve communications with non-English speaking community members within our services for City employees. We now contract with a local woman and minority owned agency who provides interpreting services for 17 different languages, including new refugee population languages. We also contract with an individual for sign-language services. We hosted listening sessions with minority community members to seek input on improving City services.

\* Staff organized and delivered the Neighborhood Academy, a four-session learning series for neighborhood leaders in May, 2016.

\* In late 2015 and early 2016, the Lawrence-City Park Neighborhood and Peabody Park Neighborhood were each awarded funding through the Neighborhood Grant Program (TNGP). Also, the Huntley Houses Neighborhood's community fitness playground project, approved for TNGP funding by Common Council, is expected to be complete by August, 2016.



# CITY OF APPLETON 2017 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

## MAJOR 2017 OBJECTIVES

- \* Continue creation, execution and implementation of the plan, primary goals and key strategies from the City's economic development strategic plan 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 remains 2.6% of new equalized value.
- \* Sell three acres of business park land.
- \* 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 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 with 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 assessing the needs and concerns of minority owned businesses to aid economic development and insure success in Appleton.
- \* Continue to strengthen community experiences for refugees and agencies serving them.
- \* Continue implementing strategic direction for the diversity and inclusion employee committee to promote diversity and inclusion within our organization to aid in recruiting and retention efforts.
- \* 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 office will focus its efforts on the final phases of its software conversion project. All property data will be converted from the iSeries system to the new assessor software system. Training, testing, system set-ups and interfaces will also occur in 2017. This large project kicked off in June, 2016 with an estimated "go live" completion date of June, 2017.
- \* In August, 2017, the Assessor's division will begin a citywide revaluation of all 1,700 commercial properties. Land valuation, field inspections, and surveying of rental income will occur by December with a project completion date of June, 2018. We revalue all property every 4-5 years in order to maintain 100% market value assessments.

## DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			%
Unit	Title	2014	2015	Adopted 2016	Amended 2016	2017	Change *
<b>Program Revenues</b>		\$ 30,293	\$ 22,688	\$ 20,800	\$ 20,800	\$ 20,800	0.00%
<b>Program Expenses</b>							
10550	Administration	452,284	507,898	516,260	525,807	534,275	3.49%
10551	Marketing	239,149	224,567	240,714	241,192	245,793	2.11%
10553	New & Redevelopment	174,027	183,650	197,042	197,042	200,544	1.78%
15020	Planning	237,899	258,018	260,018	263,887	269,731	3.74%
13520	Assessing	515,278	525,686	528,772	529,079	539,026	1.94%
<b>TOTAL</b>		\$ 1,618,637	\$ 1,699,819	\$ 1,742,806	\$ 1,757,007	1,789,369	2.67%
<b>Expenses Comprised Of:</b>							
Personnel		1,448,709	1,564,833	1,575,930	1,590,131	1,619,909	2.79%
Administrative Expense		23,707	20,554	27,521	27,521	29,530	7.30%
Supplies & Materials		13,455	13,803	13,415	13,415	14,075	4.92%
Purchased Services		123,710	89,844	116,000	116,000	116,400	0.34%
Utilities		4,084	3,833	4,272	4,272	4,212	-1.40%
Repair & Maintenance		4,972	6,952	5,668	5,668	5,243	-7.50%
Capital Expenditures		-	-	-	-	-	N/A
<b>Full Time Equivalent Staff:</b>							
Personnel allocated to programs		18.13	18.13	18.13	18.13	17.81	

# CITY OF APPLETON 2017 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.

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

Additional funding has been added to training to support the technical education needed for our staff.

Salaries have decreased due to the Community Development Specialist taking over the administration of the housing and homeless grants from being contracted. The grants provide for administration reimbursement.

## PERFORMANCE INDICATORS

	<u>Actual 2014</u>	<u>Actual 2015</u>	<u>Target 2016</u>	<u>Projected 2016</u>	<u>Target 2017</u>
<b>Client Benefits/Impacts</b>					
Employee retention					
% staff turnover	5%	5%	0%	5%	0%
Accurate and useful information					
# of layers edited (GIS)	1281	1380	700	775	700
Improve business and work flow					
# of users supported on GIS software	123	136	130	136	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	389	358	250	250	250



# CITY OF APPLETON 2017 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Administration

Business Unit 10550

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4801 Charges for Serv. - Nontax	\$ 878	\$ 831	\$ 800	\$ 800	\$ 800
5020 Donations & Memorials	-	1,502	-	-	-
Total Revenue	<u>\$ 878</u>	<u>\$ 2,333</u>	<u>\$ 800</u>	<u>\$ 800</u>	<u>\$ 800</u>
Expenses					
6101 Regular Salaries	\$ 319,761	\$ 358,905	\$ 359,842	\$ 369,389	\$ 353,499
6108 Part Time	4,599	-	-	-	-
6150 Fringes	93,364	114,139	118,075	118,075	140,424
6201 Training\Conferences	7,353	5,866	8,100	8,100	10,000
6206 Parking Permits	7,308	7,182	7,276	7,276	7,620
6301 Office Supplies	1,940	2,303	2,200	2,200	2,200
6302 Subscriptions	812	363	735	735	500
6303 Memberships & Licenses	2,400	1,974	3,200	3,200	3,200
6305 Awards & Recognition	344	270	285	285	285
6307 Food & Provisions	368	365	400	400	400
6315 Books & Library Materials	49	137	75	75	75
6320 Printing & Reproduction	9,888	12,356	11,800	11,800	11,800
6327 Miscellaneous Equipment	-	-	200	200	200
6412 Advertising	1,441	1,645	1,300	1,300	1,300
6413 Utilities	2,657	2,393	2,772	2,772	2,772
Total Expense	<u>\$ 452,284</u>	<u>\$ 507,898</u>	<u>\$ 516,260</u>	<u>\$ 525,807</u>	<u>\$ 534,275</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

None

# CITY OF APPLETON 2017 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.
- Maintain effective relations with members of culturally diverse communities.
- Continue implementation of the Economic Development Strategic Plan.
- Support diversity and inclusion for community and staff.
- Provide outreach to minority businesses.

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

No major program changes.

### PERFORMANCE INDICATORS

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
Connection to source of issue resolution or resource					
# Existing businesses assisted	39	23	40	40	40
# Start-up businesses assisted	7	15	35	20	35
Information specific to development in Appleton					
# of prospects information deliveries	65	34	70	70	70
Facilitate diversity issue resolution					
# businesses and individuals assisted	129	154	115	115	115
<b>Strategic Outcomes</b>					
Appleton's economy grows and tax base enhanced					
% increase in total equalized value	1.6%	2.6%	2.6%	2.5%	2.6%
<b>Work Process Outputs</b>					
Retention visit clients served					
# Business retention visits/follow-ups	18	30	40	40	40
Marketing and diversity initiatives completed					
# of plans and pieces developed	143	119	114	114	110



**CITY OF APPLETON 2017 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 10551**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Expenses					
6101 Regular Salaries	\$ 116,678	\$ 120,351	\$ 119,549	\$ 120,027	\$ 122,859
6150 Fringes	33,745	44,758	46,440	46,440	48,209
6303 Membership & Licenses	375	135	725	725	725
6305 Awards & Recognition	-	-	500	500	500
6404 Consulting Services	88,298	-	-	-	-
6412 Advertising	30	288	1,000	1,000	1,000
6431 Interpreter Services	23	-	500	500	500
6599 Other Contracts/Obligations	-	59,035	72,000	72,000	72,000
Total Expense	<u>\$ 239,149</u>	<u>\$ 224,567</u>	<u>\$ 240,714</u>	<u>\$ 241,192</u>	<u>\$ 245,793</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

**Other Contracts/Obligations**

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

# CITY OF APPLETON 2017 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

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
Guidance rec'd to success in dev. in Appleton					
# projects consulted	20	16	15	18	18
Assist in land assembly, development incentives, or project management					
# developments generated via direct management	10	1	5	5	5
# of improved business park acres	100	100	100	100	100
<b>Strategic Outcomes</b>					
Tax base enhanced					
\$ increase industrial/commercial	\$ 12,915,428	\$ 17,489,346	\$ 8,000,000	\$ 8,000,000	\$ 8,000,000
\$ increase in target districts	\$ 410,000	\$ 40,221,393	\$ 4,000,000	\$ 4,000,000	\$ 4,000,000
\$ business park permits	\$ 595,000	\$ 36,803,195	\$ 2,000,000	\$ 2,500,000	\$ 2,000,000
<b>Work Process Outputs</b>					
# of development agreements completed	1	0	1	1	1
# of acres sold in business park	0	7	2	9	3

# CITY OF APPLETON 2017 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**New and Redevelopment Projects**

**Business Unit 10553**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Expenses					
6101 Regular Salaries	\$ 121,461	\$ 125,082	\$ 124,764	\$ 124,764	\$ 126,811
6150 Fringes	35,089	40,649	42,278	42,278	43,733
6303 Memberships & Licenses	82	-	-	-	-
6404 Consulting Services	17,395	17,919	30,000	30,000	30,000
Total Expense	<u>\$ 174,027</u>	<u>\$ 183,650</u>	<u>\$ 197,042</u>	<u>\$ 197,042</u>	<u>\$ 200,544</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

### Consulting Services

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

\$ 30,000



# CITY OF APPLETON 2017 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 on how to register 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

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<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%	2%	2%
% of complaints received on commission applications	0%	0%	2%	2%	2%
<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			20	20	20
# of comp plan goals and objectives implemented	23	9	6	6	10
<b>Work Process Outputs</b>					
Services performed					
# of admin applications approved	417	449	425	425	425
# of commission applications approved	48	53	25	25	25
# of customers inquiries served	1,235	1,374	800	800	900
# of comp plan and ordinance amendments adopted	9	6	2	2	2
# of historic sites, buildings, districts recognized/researched	4	2	2	5	2
# of special projects	5	5	2	2	2

# CITY OF APPLETON 2017 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Planning

Business Unit 15020

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4224 Misc. State Aids	\$ 4,835	\$ -	\$ -	\$ -	\$ -
5002 Zoning & Subdivision Fees	24,580	20,355	20,000	20,000	20,000
Total Revenue	<u>\$ 29,415</u>	<u>\$ 20,355</u>	<u>\$ 20,000</u>	<u>\$ 20,000</u>	<u>\$ 20,000</u>
Expenses					
6101 Regular Salaries	\$ 172,362	\$ 185,293	\$ 184,579	\$ 188,448	\$ 191,235
6150 Fringes	60,552	72,725	75,139	75,139	78,196
6305 Awards & Recognition	-	-	300	300	300
6404 Consulting Services	4,985	-	-	-	-
Total Expense	<u>\$ 237,899</u>	<u>\$ 258,018</u>	<u>\$ 260,018</u>	<u>\$ 263,887</u>	<u>\$ 269,731</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

None



# CITY OF APPLETON 2017 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:**

The Assessor's Office will focus its Spring 2017 efforts on the conversion of all property data from the iSeries system to the new Assessor software system. We will also assist with creating the necessary interfaces and downloads from our new system to other City, County, and State systems. Training, testing and system set ups will also occur during this time. This large software project kicked off in June, 2016 with an estimated system "go live" date of June, 2017.

In August 2017, we will begin a Citywide revaluation of all 1,700 commercial properties to be completed by June, 2018. We revalue all property every 4-5 years in order to maintain 100% market value assessments. All residential parcels will be revalued the following year. This commercial revaluation will require: determining current land values; analyzing all sales prices and assessment/sale ratios; collecting and analyzing income/expenses/vacancies on rental properties; requesting inspection on 800 buildings; calculating values using comparable sales, potential net rental income, or replacement cost less depreciation; defending the new assessed values at the Board of Review, etc. Many assessed values will need to be increased due to the improved real estate market.

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

\$660 was added to misc. equipment to purchase a new commercial cost guide for the Citywide commercial revaluation.

### PERFORMANCE INDICATORS

	<u>Actual 2014</u>	<u>Actual 2015</u>	<u>Target 2016</u>	<u>Projected 2016</u>	<u>Target 2017</u>
<b>Client Benefits/Impacts</b>					
Equitable assessments and equitable distribution of tax levy:					
Assessment districts within 10% of market value	100%	95%	100%	98%	98%
Coefficient of dispersion of assessment/sale ratios	6%	8%	9%	9%	9%
# 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	101%	100%	100%	98%	100%
Commercial class level of assessment	102%	99%	100%	96%	100%
Overall level of assessment	101%	100%	100%	98%	100%
<b>Work Process Outputs</b>					
% of buildings inspected to update records:					
Commercial new construction	100%	100%	100%	100%	100%
Residential new construction	93%	95%	100%	95%	95%
Recent sales	40%	48%	50%	51%	50%
Total # of interior inspections	833	2,667	800	1,400	800
Property record maintenance:					
Deeds processed (ownership changes)	2,373	2,439	2,300	2,300	2,300
Lot splits, CSM's, & new platted parcels	109	97	100	175	175
Annexed parcel(s)	-	1	-	2	2
Assessments updated	13,392	700	700	895	800

**CITY OF APPLETON 2017 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Assessing**

**Business Unit 13520**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		2017
	2014	2015	Adopted 2016	Amended 2016	
Expenses					
6101 Regular Salaries	\$ 361,466	\$ 371,273	\$ 369,560	\$ 369,867	\$ 374,767
6105 Overtime	3,513	280	500	500	507
6150 Fringes	126,117	131,378	135,204	135,204	139,669
6201 Training\Conferences	1,532	1,505	2,200	2,200	2,200
6302 Subscriptions	844	260	1,100	1,100	1,100
6303 Memberships & Licenses	350	330	500	500	500
6327 Miscellaneous Equipment	3,517	1,310	1,340	1,340	2,000
6413 Utilities	1,428	1,441	1,500	1,500	1,440
6425 CEA Equip. Rental	4,973	6,952	5,668	5,668	5,243
6599 Other Contracts/Obligations	11,538	10,957	11,200	11,200	11,600
Total Expense	<u>\$ 515,278</u>	<u>\$ 525,686</u>	<u>\$ 528,772</u>	<u>\$ 529,079</u>	<u>\$ 539,026</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

None

Description	2014 Actual	2015 Actual	2016 YTD Actual	2016 Adopted Budget	2016 Amended Budget	2017 Requested Budget	2017 Adopted Budget
REVENUES							
Intergovernmental Revenues	4,835	.00	0	0	0	0	0
Charges for Services	878	830.90	667	800	800	800-	800
Other Revenues	24,580	21,856.97	12,405	20,000	20,000	20,000-	20,000
TOTAL REVENUES	30,293	22,687.87	13,072	20,800	20,800	20,800-	20,800
EXPENSES BY LINE ITEM							
Regular Salaries	960,128	1,015,995.58	736,745	1,158,294	1,172,495	1,186,175	1,168,671
Labor Pool Allocations	20,195	17,358.95	12,891	0	0	0	0
Overtime	3,513	279.68	980	500	500	507	507
Part-Time	4,599	.00	0	0	0	0	0
Other Compensation	870	599.94	375	0	0	0	500
Sick Pay	725	3,190.02	227	0	0	0	0
Vacation Pay	109,810	123,760.64	84,845	0	0	0	0
Fringes	348,868	403,648.35	309,493	417,136	417,136	457,292	450,231
Salaries & Fringe Benefits	1,448,708	1,564,833.16	1,145,556	1,575,930	1,590,131	1,643,974	1,619,909
Training & Conferences	8,885	7,371.49	6,742	10,300	10,300	12,200	12,200
Parking Permits	7,308	7,182.00	7,412	7,276	7,276	7,620	7,620
Office Supplies	1,940	2,302.98	902	2,200	2,200	2,200	2,200
Subscriptions	1,656	623.00	691	1,835	1,835	1,600	1,600
Memberships & Licenses	3,207	2,438.64	2,380	4,425	4,425	4,425	4,425
Awards & Recognition	344	270.00	0	1,085	1,085	1,085	1,085
Food & Provisions	368	365.40	486	400	400	400	400
Administrative Expense	23,708	20,553.51	18,613	27,521	27,521	29,530	29,530
Books & Library Materials	49	137.24	0	75	75	75	75
Printing & Reproduction	9,888	12,355.78	6,337	11,800	11,800	11,800	11,800
Miscellaneous Equipment	3,517	1,309.95	1,352	1,540	1,540	2,200	2,200
Supplies & Materials	13,454	13,802.97	7,689	13,415	13,415	14,075	14,075
Consulting Services	110,678	17,918.50	16,583	30,000	30,000	30,000	30,000
Advertising	1,464	1,932.80	702	2,300	2,300	2,300	2,300
Interpreter Services	30	.00	498	500	500	500	500
Other Contracts/Obligations	11,538	69,992.29	27,174	83,200	83,200	83,600	83,600
Purchased Services	123,710	89,843.59	44,957	116,000	116,000	116,400	116,400
Telephone	1,084	1,045.95	764	1,170	1,170	1,332	1,332
Cellular Telephone	3,001	2,787.58	2,049	3,102	3,102	2,880	2,880
Utilities	4,085	3,833.53	2,813	4,272	4,272	4,212	4,212
CEA Equipment Rental	4,973	6,952.54	3,173	5,668	5,668	5,243	5,243
Repair & Maintenance	4,973	6,952.54	3,173	5,668	5,668	5,243	5,243
Capital Expenditures	0	.00	0	0	0	0	0
TOTAL EXPENSES	1,618,638	1,699,819.30	1,222,801	1,742,806	1,757,007	1,813,434	1,789,369



**CITY OF APPLETON 2017 BUDGET**

**HOUSING AND COMMUNITY DEVELOPMENT GRANTS**

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

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

## CITY OF APPLETON 2017 BUDGET

### HOUSING AND COMMUNITY DEVELOPMENT GRANTS

#### MISSION STATEMENT

The primary goal of the City's Housing and Community Development Grant programs is the creation of a thriving urban community and improved quality of life in neighborhoods through provision of assistance to low-income households in the forms of affordable homeowner and rental housing opportunities, neighborhood education and revitalization projects.

#### DISCUSSION OF SIGNIFICANT 2016 EVENTS

##### **Homeowner Rehabilitation Loan Program**

This program benefits the City of Appleton by improving residential properties where property owners were unable to obtain financing to make the improvements on their own. In 2016, the Homeowner Rehabilitation Loan Program rehabilitated 24 owner-occupied housing units and invested nearly \$400,000 on home improvement loans. The funding sources that support the homeowner rehabilitation loan program include:

##### **Homeowner Rehabilitation Loan Program Funding Sources:**

- Program Income from the repayment of HOME Homeowner Rehabilitation loans (Business Unit 2160)
- CDBG funds from the U.S. Department of Housing and Urban Development (HUD) (Business Unit 2170)
- Program Income from the repayment of CDBG loans (Business Unit 2170)
- Program Income from the repayment of Lead Hazard Control Grant loans (Business Unit 2190)
- Program Income from the repayment of HOME Rental Rehabilitation loans (Business Unit 2130)

##### **Neighborhood Program (NP)**

Mayor Hanna and the Common Council have encouraged strengthening Appleton's neighborhoods by building strong bonds, engaging social capital, encouraging investment, and leveraging local resources. The department implemented a new Neighborhood Program (NP) in 2013, that is founded in building strong partnerships and supporting the priorities of the neighborhood as defined by the residents, and collaborating with strong community partners. Fifteen neighborhoods have registered thus far.

Staff continues to promote competitive grant funds available to registered neighborhoods through the Neighborhood Grant Program (TNGP). In late 2015 and early 2016, the Lawrence-City Park Neighborhood and Peabody Park Neighborhood were each awarded funding through TNGP. Also, the Huntley Houses Neighborhood's community fitness playground project, approved for TNGP funding by Common Council, is expected to be complete by September, 2016.

Staff organized and delivered the Neighborhood Academy, a 4-session learning series for neighborhood leaders, in May, 2016. In total, there were 12 participants representing 5 different neighborhoods.

##### **Community Development Block Grant (CDBG)**

For the 2016-2017 award of \$535,325, \$304,026 was allocated as detailed below for City programs. \$231,299 was awarded through a competitive application process.

- Homeowner Rehabilitation Loan Program \$158,651
- Neighborhood Program \$40,000
- Appleton Housing Authority \$60,000
- Fair Housing Services \$25,000
- CDBG Administration \$20,375

The 2015 CAPER was submitted as the second program year for the 2015-2019 Consolidated Plan.

An environmental review policy was established to ensure that the review procedures are administered uniformly according to the requirements set forth by HUD and other various regulations in an efficient and effective manner. In July, staff took the initial steps to transition non-CDBG grant funds from a third-party contractor to the City's Community Development Specialist position. Below are the grants that had been previously shown in the Finance budget:

##### **Continuum of Care/Supportive Housing Program (COC/SHP) #1 (THP) & #2 (PSH)**

In 2015, the City, in collaboration with the Housing Partnership of the Fox Cities, Salvation Army of the Fox Cities, and ADVOCAP, was successful in renewing both a Transitional Housing Program (THP) and a Permanent Supportive Housing (PSH) grant for another program year (October, 2015 - September, 2016 for THP and January, 2016 - December, 2016 for PSH, \$181,152 for THP and \$54,337 for PSH). Additionally, the City was awarded funds for the 2016-2017 program year (October 2016-September 2017), which included \$181,152 for THP and for the 2017 program year (January - December, 2017), which included \$54,337 (est.) for PSH.

##### **Emergency Solutions Grant/Transitional Housing Program (ESG/THP)**

The City, in collaboration with the Housing Partnership of the Fox Cities, ADVOCAP, Homeless Connection, and Fox Valley Warming Shelter was successful in its application for ESG funds for the 2015 program year (July, 2015 - June, 2016). The State separated the grants into the Emergency Solutions Grant (ESG) and the Transitional Housing Program (THP). The City received \$231,445 for ESG and \$15,872 for THP.

Additionally, the City was awarded funds for the 2016 program year (July, 2016 - June, 2017) which included \$259,563 for ESG and \$25,310 for THP.

In June, we had a monitoring visit from the DOR Division of Energy, Housing and Community Resources. Four minor issues were noted regarding sub recipients. The City is implementing policies and procedures to address these issues.



# CITY OF APPLETON 2017 BUDGET

## HOUSING AND COMMUNITY DEVELOPMENT GRANTS

### MAJOR 2017 OBJECTIVES

The following grant funded programs are intended to both benefit low and moderate income (LMI) households and eliminate slum and blight conditions in the City. Below are the specific objectives of each of these programs:

**Homeowner Rehabilitation Loan Program (HRLP)**

(Program Year: April 1 to March 31)

Improve Appleton's affordable single-family homes by rehabilitating 24 homes for LMI homeowners.

**Neighborhood Program (NP)**

(Program Year: April 1 to March 31)

Award grants to the participating registered neighborhoods from CDBG and general funds based on the application criteria.

**Community Development Block Grant (CDBG)**

(Program Year: April 1 to March 31)

Create and maintain decent and affordable housing opportunities for low-income residents.  
Strengthen community services by offering new and improved access for low-income residents.  
Expand economic opportunity through financial counseling and business revitalization activities.  
Improve various public facilities throughout Appleton to create better availability/accessibility.

**Continuum of Care/Supportive Housing Program (COC/SH) #1 and #2**

(Program Year: October 1 to September 30)

**Continuum of Care/Permanent Supportive Housing (PSH)**

(Program Year: January 1 to December 31)

Provide for adequate and successful operation of transitional and permanent supportive housing programs.  
Provide for utilization of Housing First Model.

**Emergency Solutions Grant/Transitional Housing Program (ESG/THP)**

(Program Year: July 1 to June 30)

Prevent homelessness among City of Appleton residents through housing counseling and financial assistance.  
Provide essential services and adequate facilities for transitional housing and rapid rehousing program participants utilizing the Housing First Model.  
Provide emergency shelter and associated services to persons experiencing homelessness.

DEPARTMENT BUDGET SUMMARY							
Programs		Actual		Budget			%
Unit	Title	2014	2015	Adopted 2016	Amended 2016	2017	Change *
<b>Program Revenues</b>		\$ 1,173,381	\$ 1,296,568	\$ 1,466,763	\$ 1,466,763	\$ 1,502,015	2.40%
<b>Program Expenses</b>							
2100	CDBG	276,219	375,645	380,000	380,000	446,778	17.57%
2140	Emergency Shelter	262,349	269,963	247,317	247,317	284,873	15.19%
2150	Continuum of Care	227,296	254,587	231,346	231,346	235,489	1.79%
2170	Homeowner Rehab Loan	469,723	367,108	448,100	449,494	446,222	-0.42%
2180	Neighborhood Program	42,200	2,142	166,450	166,450	96,422	-42.07%
	Discontinued	258	-	-	-	-	
<b>TOTAL</b>		\$ 1,278,045	\$ 1,269,445	\$ 1,473,213	\$ 1,474,607	\$ 1,509,784	2.48%
<b>Expenses Comprised Of:</b>							
	Personnel	82,446	89,905	94,790	96,184	123,973	30.79%
	Administrative Expense	1,159,759	1,129,602	1,338,376	1,338,376	1,373,591	2.63%
	Supplies & Materials	1,838	505	500	500	500	0.00%
	Purchased Services	33,863	49,325	39,287	39,287	11,460	-70.83%
	Utilities	139	108	260	260	260	0.00%
	Repair & Maintenance	-	-	-	-	-	N/A
	Capital Expenditures	-	-	-	-	-	N/A
<b>Full Time Equivalent Staff:</b>							
	Personnel allocated to programs	1.00	1.00	1.08	1.08	1.40	



# CITY OF APPLETON 2017 BUDGET

## HOUSING AND COMMUNITY DEVELOPMENT GRANTS

**Community Development Block Grant**

**Business Unit 2100**

### PROGRAM MISSION

In order to provide decent housing, create suitable living environments and expand economic opportunities for low-income persons, the City will administer the receipt and expenditure of Federal Community Development Block Grant (CDBG) proceeds for affordable housing rehabilitation, public facilities improvements, neighborhood revitalization projects, provision of public services and various other community development projects.

### PROGRAM NARRATIVE

#### Link to City Goals:

Key Strategy # 2: "Encourage active community participation and involvement".

#### Objectives:

The creation of a thriving urban community through provision of assistance to low and moderate income (LMI) households in the forms of basic shelter, affordable housing opportunities, expanded economic opportunities, suitable living environments and supportive services related to residential, financial and social stability.

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

Revenues and expenditures associated with this program are subject to the final entitlement award amount, as well as the Community and Economic Development Committee and City Council approval of CDBG subrecipient awards.

For the overall CDBG timeliness ratio, a grantee is considered to be timely if, 60 days prior to the end of the grantee's current program year, the amount of entitlement grant funds available to the recipient under grant agreements but undisbursed by the U.S. Treasury is less than or equal to 1.5 times the annual entitlement grant amount for its current program year. As indicated below, the timeliness ratio has been met.

Due to changes in Federal guidance in regard to administrative requirements, cost principles, and audit requirements, a small portion of the Housing Coordinator's salary will be drawn from the CDBG general administration funds, along with a small amount of Finance Department staff time and audit fee expense. The Housing Coordinator's time allocated to CDBG will increase in 2017 to better reflect the actual amount of time the position is spending on these activities.

The 2016 CDBG award was \$535,325 (for the period April 1, 2016 - March 31, 2017), a slight increase from the 2015-2016 award. The estimated award for the 2017-2018 program year is \$528,000. The allocation of the funds are as follows:

CDBG - Community Dev/Finance Admin	\$ 109,192*
Homeowner Rehab. Loan Program	81,222
Neighborhood Program	0**
	190,414
Awarded through competitive application process	<u>337,586</u>
Total estimated award	<u>\$ 528,000</u>

\* Includes requirement for Fair Housing Services and any allocation for Appleton Housing Authority.

\*\* Neighborhood Program is not requesting funding for 2017-2018 program year due to previous unspent grant monies.

### PERFORMANCE INDICATORS

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
Funding for community programs					
Annual Entitlement Amount (program yr.)	\$ 525,200	\$ 523,813	\$ 520,000	\$ 535,325	\$ 528,000
Carryover from previous years	\$ -	\$ -	\$ -	\$ -	\$ -
Reprogrammed CDBG Funds	\$ -	\$ -	\$ -	\$ 15,460	\$ -
Percent of awards spent on projects	91.05%	92.00%	88.00%	92.00%	90.50%
Average award (not including program income)	\$ 43,473	\$ 48,181	\$ 40,000	\$ 48,995	\$ 40,000
<b>Strategic Outcomes</b>					
Maintain integrity of programs					
# of single-audit findings	0	3	0	0	0
# of HUD exceptions to annual action plan	0	0	0	0	0
# of HUD CAPER findings	0	0	0	0	0
Timely expenditure of funds					
Official HUD timeliness ratio (max. 1.5:1)					
Overall program	1.38:1	1.42:1	1.5:1	1.42:1	1.5:1
<b>Work Process Outputs</b>					
# of Block Grant awards made	11	10	10	10	10



# CITY OF APPLETON 2017 BUDGET

## HOUSING AND COMMUNITY DEVELOPMENT GRANTS

**Community Development Block Grant**

**Business Unit 2100**

### PROGRAM BUDGET SUMMARY

Description	Actual		Budget		2017
	2014	2015	Adopted 2016	Amended 2016	
Revenues					
4210 Federal Grants	\$ 281,762	\$ 368,069	\$ 380,000	\$ 380,000	\$ 446,778
Total Revenue	<u>\$ 281,762</u>	<u>\$ 368,069</u>	<u>\$ 380,000</u>	<u>\$ 380,000</u>	<u>\$ 446,778</u>
Expenses					
6101 Regular Salaries	\$ -	\$ 11,122	\$ 10,282	\$ 10,282	\$ 14,162
6150 Fringes	-	2,868	2,708	2,708	3,670
6201 Training/Conferences	1,126	766	2,500	2,500	2,500
6301 Office Supplies	-	-	800	800	400
6303 Memberships & Licenses	75	75	940	940	940
6320 Printing & Reproduction	1,838	477	500	500	500
6401 Accounting & Audit	1,500	1,560	1,630	1,630	1,560
6404 Consulting Services	2,994	7,576	-	-	-
6412 Advertising	294	397	500	500	400
6413 Utilities	46	47	60	60	60
6599 Other Contracts/Obligations	-	-	455	455	-
6608 Block Grant Payments	268,346	350,757	359,625	359,625	422,586
Total Expense	<u>\$ 276,219</u>	<u>\$ 375,645</u>	<u>\$ 380,000</u>	<u>\$ 380,000</u>	<u>\$ 446,778</u>

### DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

#### Block Grant Payments

Appleton Housing Authority Award	\$ 60,000
Fair Housing Services	25,000
Awards and loans to community organizations and individuals for the benefit of low to moderate income (LMI) persons	337,586
	<u>\$ 422,586</u>

#### Summary of the Appleton CDBG Allocation Process

Each program year, administration costs, funding for fair housing requirements, the Homeowner Rehabilitation Loan Program, the Neighborhood Services Program and Appleton Housing Authority, plus any other City programs that qualify for CDBG funding will be subtracted from the annual entitlement award amount to determine an adjusted dollar figure of CDBG funds available for subrecipient projects.



# CITY OF APPLETON 2017 BUDGET

## HOUSING, HOMELESS AND BLOCK GRANTS

**Emergency Solutions Grant (ESG)/Transitional Housing Program (THP)**

**Business Unit 2140**

### PROGRAM MISSION

To promote efficient and cooperative use of resources by local non-profit agencies for the benefit of persons in need of emergency shelter, transitional housing and homeless prevention services in the City of Appleton and the greater Fox Cities region.

### PROGRAM NARRATIVE

#### Link to City Goals:

Key Strategy # 2: "Encourage active community participation and involvement".

#### Objectives:

The purpose of this grant is to benefit persons in need of emergency shelter, transitional housing and homeless prevention services. Emergency Transitional Housing/Transitional Housing Program (ESG/THP) funds are disbursed by the Wisconsin Department of Administration via a competitive grant application process.

As the lead fiscal and administrative agent, the City of Appleton applies for ESG/THP funding in collaboration with other local non-profit partners. The City serves as a pass-through for funding to local non-profit agencies that meet the niche requirements of the ESG/THP program. In exchange for serving as the lead fiscal and administrative agent, the City of Appleton receives a small amount of funding for administration costs. The City uses some of the administration funds for HMIS (Homeless Management Information System). Effective March 1, 2014, the Institute for Community Alliances (ICA) became the HMIS lead organization for the State of Wisconsin.

ESG/THP funds may be used in the following areas related to emergency shelter and transitional housing programs: rehabilitation of facilities, essential supportive services, operation costs and homeless prevention services. The shelter programs may include shelters for victims of domestic violence, runaway adolescents, persons with disabilities as well as generic shelter and transitional housing programs. Any city, county or private non-profit agency may apply for funding during the State's annual competition for ESG/THP funding.

The current partner agencies receiving ESG/THP funding are: Housing Partnership of the Fox Cities, Homeless Connection, ADVOCAP, and Fox Valley Warming Shelter.

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

The department transitioned the management of non-CDBG grant funds from a third-party contractor to the City's Community Development Specialist position. This grant had previously been shown in the Finance budget.

### PERFORMANCE INDICATORS

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
\$ Grant Award ESG	\$ 212,609	\$ 214,354	\$ 231,445	\$ 231,445	\$ 259,563
\$ Grant Award THP	N/A	\$ 12,662	\$ 15,872	\$ 15,872	\$ 25,310
<b>Strategic Outcomes</b>					
Expand the # of homeless persons served					
# assisted in emergency shelter	1,000	985	1,000	980	1,000
# assisted in rapid rehousing	57	61	30	58	60
# assisted with prevention services	361	349	350	350	350
<b>Work Process Outputs</b>					
# grant applications prepared	1	2	2	2	2
# of contract period extensions requested	0	0	0	0	0

# CITY OF APPLETON 2017 BUDGET

## HOUSING, HOMELESS AND BLOCK GRANTS

**Emergency Solutions Grant (ESG)/Transitional Housing Program (THP)**

**Business Unit 2140**

### PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4224 Miscellaneous State Aids	\$ 259,650	\$ 271,198	\$ 247,317	\$ 247,317	\$ 284,873
Total Revenue	<u>\$ 259,650</u>	<u>\$ 271,198</u>	<u>\$ 247,317</u>	<u>\$ 247,317</u>	<u>\$ 284,873</u>
Expenses					
6101 Regular Salaries	\$ -	\$ -	\$ -	\$ -	\$ 8,301
6150 Fringes	-	-	-	-	3,659
6404 Consulting Services	8,800	12,788	15,523	15,523	3,900
6630 Other Grant Payments	253,549	257,175	231,794	231,794	269,013
Total Expense	<u>\$ 262,349</u>	<u>\$ 269,963</u>	<u>\$ 247,317</u>	<u>\$ 247,317</u>	<u>\$ 284,873</u>

### DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

#### Other Grant Payments

Awards and loans to community organizations and individuals for the benefit of low to moderate income (LMI) persons:

	ESG/HPP	THP	Total
Housing Partnership	\$ 69,399	\$ 12,655	\$ 82,054
ADVOCAP	37,869	12,655	50,524
Homeless Connection	103,597	-	103,597
Fox Valley Warming Shelter	32,838	-	32,838
	<u>\$ 243,703</u>	<u>\$ 25,310</u>	<u>\$ 269,013</u>



# CITY OF APPLETON 2017 BUDGET

## HOUSING, HOMELESS AND BLOCK GRANTS

**Continuum of Care Supportive Housing Program (COC/SHP)**

**Business Unit 2150**

### PROGRAM MISSION

To provide necessary case management and support services to individuals and families enrolled in transitional and permanent supportive housing programs, the City of Appleton will serve as a pass-through entity and administer funds to local non-profit organizations that directly serve the target population in Appleton and the Fox Cities.

### PROGRAM NARRATIVE

#### Link to City Goals:

Key Strategy # 2: "Encourage active community participation and involvement".

#### Objectives:

The purpose of this grant is to benefit formerly homeless Appleton residents who need extensive case management and supportive services in order to achieve a stable living environment.

Continuum of Care/Supportive Housing Program (COC/SHP) funds support programs that offer both housing opportunities and related supportive services for persons transitioning from homelessness to independent living. Specifically, COC/SHP funds supportive housing in the following environments: (1) transitional housing; (2) permanent housing for homeless persons with disabilities; (3) other types of innovative supportive housing for homeless people.

COC/SHP funds are disbursed by the U.S. Department of Housing & Urban Development, but are awarded to the City of Appleton as a partner in the Balance of State (Wisconsin) via a competitive grant application process. As the lead fiscal and administrative agent, the City of Appleton applies for two separate COC/SHP grants in collaboration with other local non-profit partners -- one for a collaborative transitional housing program (THP) and one for a permanent supportive housing (PSH).

The City serves as a pass-through for this funding to local non-profit agencies that meet the niche requirements of the COC/SHP program. Three agencies, including Housing Partnership of the Fox Cities, Salvation Army of the Fox Cities and ADVOCAP, receive THP funding, while the Housing Partnership of the Fox Cities receives the PSH funding. In exchange for serving as the lead fiscal and administrative agent, the City of Appleton receives a small amount of funding for administration costs.

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

The department transitioned the management of non-CDBG grant funds from a third-party contractor to the City's Community Development Specialist position. This grant had previously been shown in the Finance budget.

### PERFORMANCE INDICATORS

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
\$ Annual Award (SHP 1 - THP)	\$ 181,152	\$ 181,152	\$ 181,152	\$ 181,152	\$ 181,152
\$ Annual Award (SHP 2 - PSH)	\$ 53,394	\$ 53,628	\$ 50,194	\$ 50,194	\$ 54,337
<b>Strategic Outcomes</b>					
Help clients improve self-sufficiency					
% of participants that moved from transitional to permanent housing	87%	70%	70%	70%	70%
% of participants in permanent housing who maintained or increased income	65%	56%	77%	77%	77%
<b>Work Process Outputs</b>					
# grants applications prepared	2-Renewal	2-Renewal	2-Renewal	2-Renewal	2-Renewal
# of contract period extensions requested	0	0	0	0	0



# CITY OF APPLETON 2017 BUDGET

## HOUSING, HOMELESS AND BLOCK GRANTS

**Continuum of Care Grant Supportive Housing Program (COC/SHP)**

**Business Unit 2150**

### PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Tax	\$ 5,000	\$ -	\$ -	\$ -	\$ -
4224 Miscellaneous State Aids	227,296	254,587	231,346	231,346	235,489
Total Revenue	<u>\$ 232,296</u>	<u>\$ 254,587</u>	<u>\$ 231,346</u>	<u>\$ 231,346</u>	<u>\$ 235,489</u>
Expenses					
6101 Regular Salaries	\$ -	\$ -	\$ -	\$ -	\$ 9,552
6150 Fringes	-	-	-	-	4,207
6201 Training/Conferences	-	-	-	-	1,470
6320 Printing & Reproduction	-	29	-	-	-
6404 Consulting	15,228	15,200	15,229	15,229	-
6630 Other Grant Payments	212,068	239,358	216,117	216,117	220,260
Total Expense	<u>\$ 227,296</u>	<u>\$ 254,587</u>	<u>\$ 231,346</u>	<u>\$ 231,346</u>	<u>\$ 235,489</u>

### DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

#### Other Grant Payments

Awards and loans to community organizations and individuals for the benefit of low to moderate income (LMI) persons:

	SHP #1 - THP	SHP #2 - PSH	Total
ADVOCAP	\$ 69,974	\$ -	\$ 69,974
Housing Partnership	35,390	50,903	86,293
Salvation Army	63,993	-	63,993
	<u>\$ 169,357</u>	<u>\$ 50,903</u>	<u>\$ 220,260</u>

# CITY OF APPLETON 2017 BUDGET

## HOUSING AND COMMUNITY DEVELOPMENT GRANTS

### HOMEOWNER REHABILITATION LOAN PROGRAM

Business Unit 2160/2170/2190

#### PROGRAM MISSION

In order to assist low and moderate income (LMI) homeowners in protecting the investment in their single-family homes or owner-occupied duplex, the Homeowner Rehabilitation Loan Program (HRLP) will utilize CDBG funds, HOME Homeowner funds, and Lead Hazard Control funds to provide them with no interest/no monthly payment loans to make necessary repairs, eliminate lead-based paint hazards, increase the value and extend the life of their homes.

#### PROGRAM NARRATIVE

##### Link to City Goals:

Implements Key Strategies #2: "Encourage active community participation and involvement", and # 7: "Communicate our success through stories and testimonials".

##### Objectives:

Provide LMI homeowners in the City of Appleton with financial and related technical assistance for the rehabilitation of their single-family homes or owner-occupied duplexes in order to maintain affordable home ownership opportunities for all residents.

The Homeowner Rehabilitation Loan Program (HRLP) is a revolving loan program that combines CDBG grant funds, CDBG Program Income, HOME Homeowner/Rental Program Income and Lead Hazard Control Program Income to rehabilitate owner-occupied housing units.

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

Due to changes in Federal guidance in regard to administrative requirements, cost principles and audit requirements, the Homeowner Rehabilitation Loan Program budget includes 90% of the Housing Coordinator's salary and fringes. The remaining 10% is included in the Community Development Block Grant budget as general program administration. In the future, if CDBG funds are eliminated, 100% of the Housing Coordinator's salary and fringes will come out of the City's General fund.

The CDBG funds award is only for the Homeowner Rehabilitation Program project delivery costs (program administration). This is due to an increase in program income that is expected to cover project costs.

#### PERFORMANCE INDICATORS

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<b>Client Benefits/Impacts</b>					
Funding for LMI homeowner rehabilitation projects					
CDBG funds award amount	\$ 175,000	\$ 175,000	\$ 100,000	\$ 158,651	\$ 81,222
Program income received (all grants)	\$ 203,361	\$ 301,281	\$ 348,100	\$ 348,100	\$ 365,000
Unspent grant funds					
Committed	\$ 58,520	\$ 80,761	\$ 75,000	\$ 75,000	\$ 75,000
Uncommitted	\$ 241,431	\$ 294,922	\$ 160,000	\$ 160,000	\$ 160,000
<b>Strategic Outcomes</b>					
Improved LMI single-family homes and owner-occupied duplexes					
# of loans made	22	23	24	24	24
# units rehabilitated	23	24	24	24	24
# residents benefited	68	58	60	60	60
Average loan amount	\$ 17,475	\$ 13,130	\$ 15,000	\$ 15,000	\$ 15,000
Amount committed to rehab activity	\$ 391,577	\$ 301,993	\$ 360,000	\$ 360,000	\$ 360,000
<b>Work Process Outputs</b>					
# of applications processed	57	52	33	33	33
# of applications approved	29	27	27	27	27



**CITY OF APPLETON 2017 BUDGET**  
**HOUSING AND COMMUNITY DEVELOPMENT GRANTS**  
**HOMEOWNER REHABILITATION LOAN PROGRAM** **Business Unit 2160/2170/2190**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4210 Federal Grants	\$ 162,749	\$ 92,857	\$ 100,000	\$ 100,000	\$ 81,222
4710 Interest on Investments	-	2	-	-	-
5035 Other Reimbursements	1,421	8,526	-	-	-
5050 Rehab Project Repayments	200,578	301,329	348,100	348,100	365,000
Total Revenue	<u>\$ 364,748</u>	<u>\$ 402,714</u>	<u>\$ 448,100</u>	<u>\$ 448,100</u>	<u>\$ 446,222</u>
Expenses					
6101 Regular Salaries	\$ 66,476	\$ 61,636	\$ 66,371	\$ 67,765	\$ 65,093
6150 Fringes	15,970	14,279	15,429	15,429	15,329
6201 Training/Conferences	808	152	600	600	600
6413 Utilities	92	62	200	200	200
6599 Other Contracts/Obligations	2,514	11,803	5,500	5,500	5,000
6608 Block Grant Payments	383,863	279,176	278,500	278,500	330,000
6630 Other Grant Payments	-	-	81,500	81,500	30,000
Total Expense	<u>\$ 469,723</u>	<u>\$ 367,108</u>	<u>\$ 448,100</u>	<u>\$ 449,494</u>	<u>\$ 446,222</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

Block Grant Payments

Loans to Low and Moderate Income households for the rehabilitation of their homes using CDBG funds.  
 Rehab projects

\$ 330,000

Other Grant Payments

Loans to Low and Moderate Income households for the rehabilitation of their homes using Lead Hazard Control and HOME Homeowner funds.  
 Rehab projects

\$ 30,000

# CITY OF APPLETON 2017 BUDGET

## HOUSING AND COMMUNITY DEVELOPMENT GRANTS

### NEIGHBORHOOD PROGRAM

Business Unit 2180

#### PROGRAM MISSION

For the benefit of Appleton neighborhoods, the Neighborhood Program (NP) will help create and/or maintain suitable living environments by providing opportunities that encourage and facilitate private and public investment in residential and commercial areas of the City. This community investment provides the impetus for overall neighborhood improvements -- such as strengthening existing neighborhoods, attracting new businesses, enhancing public spaces -- that contribute to the social, cultural and economic vitality of neighborhoods.

#### PROGRAM NARRATIVE

##### Link to City Goals:

Implements Key Strategies #2: "Encourage active community participation and involvement" and # 7: "Communicate our success through stories and testimonials".

##### Objectives:

The goal of this program is to foster communication between neighborhoods and the City of Appleton. Provide the expertise and technical assistance in administering the City's Neighborhood Program including assisting residents on how to register their neighborhood, market the program to City residents and work with Appleton residents, other City staff and outside agencies to leverage resources to help improve Appleton's neighborhoods.

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

The NP delivery will incorporate the use of multiple CDBG national objectives as a means of facilitating and completing projects in a timely and effective manner.

Staff organized and delivered the Neighborhood Academy, a 4-session learning series for neighborhood leaders in May, 2016. In 2017, facilitating opportunities for neighborhoods to report out their successes, solicit peer review and learn about City resources may replace the conventional Neighborhood Academy. Grant funds will continue to be available to registered neighborhoods. Neighborhood grants (CDBG) totaling \$88,653 are anticipated in 2017, after a \$70,000 award to the Huntley Houses Neighborhood in 2016. The NP will not request additional CDBG funding in 2017, in order to draw down remaining funds from prior year allocations. Once "caught up", future CDBG funding requests are anticipated.

To truly strengthen our entire City, neighborhoods need the tools to connect with their neighbors. Examples could be: polls of neighborhoods, community gatherings and other opportunities to promote communication and identify needs. This budget includes \$3,000 of property taxes that would be available to all neighborhoods, not just those qualified by HUD.

#### PERFORMANCE INDICATORS

	<u>Actual 2014</u>	<u>Actual 2015</u>	<u>Target 2016</u>	<u>Projected 2016</u>	<u>Target 2017</u>
<b>Client Benefits/Impacts</b>					
# of new partnerships/ collaborations generated	1	0	1	1	1
# of registered neighborhoods	13	15	14	15	16
# of Neighborhood Academy participants	19	0	20	12	0
<b>Strategic Outcomes</b>					
# of projects awarded grant funding	new measure	2	2	2	2
<b>Work Process Outputs</b>					
Grant Funds (CDBG)					
Committed	\$ 30,000	\$ 70,000	\$ -	\$ -	\$ 88,653
Uncommitted	\$ 90,000	\$ 48,653	\$ -	\$ 88,653	\$ -
Spent	\$ 39,925	\$ 1,422	\$ 158,653	\$ 70,000	\$ 88,653
General Funds					
Committed	\$ 2,775	\$ 1,800	\$ 5,730	\$ 1,200	\$ 7,769
Uncommitted	\$ -	\$ 1,650	\$ -	\$ 4,530	\$ -
Spent	\$ 2,275	\$ 720	\$ 5,730	\$ 961	\$ 7,769



<b>CITY OF APPLETON 2017 BUDGET</b> <b>HOUSING AND COMMUNITY DEVELOPMENT GRANTS</b> <b>NEIGHBORHOOD PROGRAM</b>	<b>Business Unit 2180</b>
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**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ -	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
4210 Federal Grants	39,925	-	160,000	160,000	88,653
Total Revenue	<u>\$ 39,925</u>	<u>\$ 3,000</u>	<u>\$ 163,000</u>	<u>\$ 163,000</u>	<u>\$ 91,653</u>
Expenses					
6201 Training\Conferences	\$ -	\$ 1,422	\$ -	\$ -	\$ -
6404 Consulting	2,275	-	450	450	-
6599 Other Contracts/Obligations	-	-	2,000	2,000	-
6608 Block Grant Payments	39,925	-	161,000	161,000	88,653
6630 Other Grant Payments	-	720	3,000	3,000	7,769
Total Expense	<u>\$ 42,200</u>	<u>\$ 2,142</u>	<u>\$ 166,450</u>	<u>\$ 166,450</u>	<u>\$ 96,422</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

Block grant payments

Targeted Neighborhood Investment grants to create strong neighborhoods	\$ 88,653
	<u>\$ 88,653</u>

Description	2014 Actual	2015 Actual	2016 YTD Actual	2016 Adopted Budget	2016 Amended Budget	2017 Requested Budget	2017 Adopted Budget
REVENUES							
Intergovernmental Revenues	971,381	986,711	473,752	1,118,663	1,118,663	618,075-	1,137,015
Interest Income	0	2	7	0	0	0	0
Other Revenues	201,997	309,855	204,277	348,100	348,100	365,000-	365,000
TOTAL REVENUES	1,173,378	1,296,568	678,036	1,466,763	1,466,763	983,075-	1,502,015
EXPENSES BY LINE ITEM							
Regular Salaries	57,782	64,038	46,932	76,653	78,047	72,325	97,108
Sick Pay	505	642	271	0	0	0	0
Vacation Pay	8,189	8,078	5,366	0	0	0	0
Fringes	15,970	17,147	12,339	18,137	18,137	16,887	26,865
Salaries & Fringe Benefits	82,446	89,905	64,908	94,790	96,184	89,212	123,973
Training & Conferences	1,934	2,340	4,801	5,100	5,100	3,100	4,570
Office Supplies	0	0	0	800	800	400	400
Memberships & Licenses	75	75	1,090	940	940	940	940
CDBG Expenses	692,134	629,933	288,190	880,625	880,625	852,503	841,239
Block Grant Payments	465,616	497,253	287,162	450,911	450,911	33,000	526,442
Administrative Expense	1,159,759	1,129,601	581,243	1,338,376	1,338,376	889,943	1,373,591
Printing & Reproduction	1,838	505	0	500	500	500	500
Supplies & Materials	1,838	505	0	500	500	500	500
Accounting/Audit	1,500	1,560	1,630	1,630	1,630	1,560	1,560
Consulting Services	29,555	35,565	20,458	31,202	31,202	0	3,900
Advertising	294	397	85	500	500	400	400
Other Contracts/Obligations	2,514	11,803	2,125	5,955	5,955	4,200	5,600
Purchased Services	33,863	49,325	24,298	39,287	39,287	6,160	11,460
Telephone	103	103	76	260	260	260	260
Cellular Telephone	36	5	10	0	0	0	0
Utilities	139	108	86	260	260	260	260
Repair & Maintenance	0	0	0	0	0	0	0
Capital Expenditures	0	0	0	0	0	0	0
TOTAL EXPENSES	1,278,045	1,269,444	670,535	1,473,213	1,474,607	986,075	1,509,784

**CITY OF APPLETON 2017 BUDGET**  
**HOUSING AND COMMUNITY DEVELOPMENT GRANTS**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Property Taxes	\$ 5,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Intergovernmental	971,382	986,711	1,118,663	1,118,663	1,137,015
Other	201,999	309,857	348,100	348,100	365,000
Total Revenues	<u>1,178,381</u>	<u>1,299,568</u>	<u>1,469,763</u>	<u>1,469,763</u>	<u>1,505,015</u>
<b>Expenses</b>					
Program Costs	<u>1,278,045</u>	<u>1,269,445</u>	<u>1,473,213</u>	<u>1,474,607</u>	<u>1,509,784</u>
Total Expenses	<u>1,278,045</u>	<u>1,269,445</u>	<u>1,473,213</u>	<u>1,474,607</u>	<u>1,509,784</u>
Revenues over (under) Expenses	(99,664)	30,123	(3,450)	(4,844)	(4,769)
<b>Other Financing Sources (Uses)</b>					
Operating Transfers In	-	-	-	-	-
Net Change in Equity	(99,664)	30,123	(3,450)	(4,844)	(4,769)
Fund Balance - Beginning	193,215	93,551	123,674	123,674	118,830
Residual Equity Transfers Out	-	-	-	-	-
Fund Balance - Ending	<u>\$ 93,551</u>	<u>\$ 123,674</u>	<u>\$ 120,224</u>	<u>\$ 118,830</u>	<u>\$ 114,061</u>



CITY OF APPLETON 2017 BUDGET	
SPECIAL REVENUE FUNDS	

NOTES



**CITY OF APPLETON 2017 BUDGET  
CAPITAL PROJECTS FUNDS**

**NOTES**



# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Industrial Park Land**

**Business Unit 4280/4281**

### PROGRAM MISSION

The Industrial Park Land Fund is the clearing house for the City's industrial and business park land sale revenue, acquisition of associated land, debt service from prior acquisition, and land development costs associated with industrial/business park infrastructures. This fund is utilized for these purposes exclusive of the industrial/business park areas developed and financed with tax incremental financing district(s).

### PROGRAM NARRATIVE

#### Link to City Goals:

Implements Key Strategy # 2: "Encourage active community participation and involvement".

#### Objectives:

The 2017 budget includes funds for maintenance and marketing of the remaining 1.44 acres of land in the City's Northeast Business Park, including weed cutting, berm maintenance, soil testing, environmental reviews, surveys, real estate commissions, title insurance, and other costs associated with selling land, in addition to the portion of Southpoint Commerce Park that is outside of TIF District #6. Maintenance costs associated with 7 acres of land acquired in 2016 along Edgewood Drive to secure the City growth corridor is also included in this budget. In addition, funds to cover the cost of lighting the two business park identification signs marking the main entrances to the Northeast Business Park. There are currently 12 parcels sold in the Northeast Business Park that remain undeveloped. Per the covenants the owners have one year to develop. The City has first right of refusal on these

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

The farm lease for vacant business park land is based currently on \$210 an acre with 144 acres leased in 2016. It is anticipated the leasable land will decrease to 142.4 acres in 2017 with the extension of Millis Drive from Alliance to Eisenhower Drive. 80% of the lease revenue is payable to the IPLF and 20% to TIF #6.

Land purchases are budgeted in 2017 to repurchase lots in the Northeast Business Park that are not in compliance with the protective covenants for construction. Purchases are only made at the direction of the Common Council.

Other contracts/obligations does not include any amounts for real estate commissions as in the past based on the available lots to sell.

This funding request includes \$25,000 in consulting services to complete a feasibility analysis of the City creating a wetland mitigation bank, which are restored, enhanced or created wetlands whose purpose is to provide credits to offset unavoidable impacts to existing wetlands. Currently the DNR imposes a mitigation fee for impacted wetlands. The potential for the City to manage its own bank for project could save money in the long-term. The feasibility analysis would be the first step in this process.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for business park land sale revenue, acquisition of associated land, debt service from prior acquisition, and land development costs associated with industrial/business park infrastructures, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	2017	
<b>Program Revenues</b>		\$ 55,592	\$ 405,034	\$ 118,520	\$ 118,520	\$ 33,123	-72.05%
<b>Program Expenses</b>		\$ 14,023	\$ 48,560	\$ 237,623	\$ 847,623	\$ 257,728	8.46%
<b>Expenses Comprised Of:</b>							
Personnel		-	2,560	2,223	2,223	2,304	3.64%
Administrative Expense		-	-	-	-	-	N/A
Supplies & Materials		-	-	-	-	-	N/A
Purchased Services		12,231	24,828	34,600	34,600	52,000	50.29%
Utilities		1,469	447	800	800	3,424	328.00%
Repair & Maintenance		323	75	-	-	-	N/A
Capital Expenditures		-	20,650	200,000	810,000	200,000	0.00%



**CITY OF APPLETON 2017 BUDGET  
CAPITAL PROJECTS FUNDS**

**Industrial Park Land**

**Business Unit 4280/4281**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4710 Interest on Investments	\$ 19,724	\$ 8,026	\$ 15,000	\$ 15,000	\$ 9,200
5004 Sale of City Prop - Nontax	-	397,008	80,000	80,000	-
5015 Rental of City Property	35,868		23,520	23,520	23,923
Total Revenue	<u>\$ 55,592</u>	<u>\$ 405,034</u>	<u>\$ 118,520</u>	<u>\$ 118,520</u>	<u>\$ 33,123</u>
Expenses					
6102 Labor Pool Allocations	\$ -	\$ 1,907	\$ 1,660	\$ 1,660	\$ 1,729
6150 Fringes	-	653	563	563	575
6404 Consulting Services	-	558	5,000	5,000	30,000
6412 Advertising	9,350	6,206	18,000	18,000	18,000
6413 Utilities	1,469	447	800	800	3,424
6425 CEA Equip. Rental	323	75	-	-	-
6599 Other Contract/Obligations	2,881	18,064	11,600	11,600	4,000
6801 Land	-	-	200,000	810,000	200,000
6809 Infrastructure Construction	-	20,650	-	-	-
Total Expense	<u>\$ 14,023</u>	<u>\$ 48,560</u>	<u>\$ 237,623</u>	<u>\$ 847,623</u>	<u>\$ 257,728</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

Land

Re-purchase industrial park lots \$ 200,000

Consulting Services

Wetland Mitigation Bank feasibility study \$ 25,000  
Testing and analysis 5,000  
\$ 30,000

Advertising

Marketing \$ 18,000

**CITY OF APPLETON 2017 BUDGET**  
**INDUSTRIAL PARK LAND**  
**SOURCES AND USES OF FUNDS**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Interest Income	\$ 19,723	\$ 8,026	\$ 15,000	\$ 20,000	\$ 9,200
Other	35,868	24,696	23,520	24,192	23,923
Total Revenues	55,591	32,722	38,520	44,192	33,123
<b>Expenses</b>					
Program Costs	14,022	48,560	237,623	937,200	257,728
Total Expenses	14,022	48,560	237,623	937,200	257,728
Revenues over (under) Expenses	41,569	(15,838)	(199,103)	(893,008)	(224,605)
<b>Other Financing Sources (Uses)</b>					
Operating Transfers Out	-	-	-	-	-
Sale of City Property	-	372,312	80,000	57,600	-
Total Other Financing Sources (Uses)	-	372,312	80,000	57,600	-
Net Change in Equity	41,569	356,474	(119,103)	(835,408)	(224,605)
Fund Balance - Beginning	1,357,716	1,399,285	1,755,759	1,755,759	920,351
Fund Balance - Ending	\$ 1,399,285	\$ 1,755,759	\$ 1,636,656	\$ 920,351	\$ 695,746



**CITY OF APPLETON 2017 BUDGET  
CAPITAL PROJECTS FUNDS**

**NOTES**

# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Community & Economic Development**

**Business Unit 4330**

### PROGRAM MISSION

This fund provides for the City's investment in the redevelopment of the riverfront and targeted areas.

### PROGRAM NARRATIVE

#### Link to City Goals:

Implements Key Strategy # 2: "Encourage active community participation and involvement".

#### Objectives:

The City's updated Comprehensive Plan 2010-2030, including the downtown plan and Fox River chapters, and the economic development strategic plan have identified areas where redevelopment may be appropriate. The ability of the City to acquire properties in these areas as they become available will enhance our ability to influence meaningful redevelopment. Supporting the retention, growth and long-term economic vitality of Appleton's businesses is also a priority.

Specific funding for 2017 is requested for the Appleton Redevelopment Authority to complete next steps in the redevelopment of opportune acquisitions properties and projects that become available within areas of the City that are in need of redevelopment. These redevelopment projects will become part of a developed plan to revive depressed areas of the City.

Further descriptions of projects to be funded from this fund can be found in the Capital Projects section of the budget, as follows:

Project	Subledger	Amount	Page
Comprehensive Plan/Downtown Update	1616	500,000	Projects, Pg. 601
Miscellaneous Site Acquisition - ARA	1616	500,000	Projects, Pg. 562
		<u>\$ 1,000,000</u>	

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

The projects funded by this program vary from year to year.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget		% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	
	<b>Program Revenues</b>	\$ 42,699	\$ 849,847	\$ -	\$ -	\$ -
	<b>Program Expenses</b>	\$ 490,438	\$ 2,414,834	\$ 1,215,000	\$ 1,250,000	\$ 1,000,000
<b>Expenses Comprised Of:</b>						
	Personnel	-	-	-	-	-
	Administrative Expense	239,007	4,834	-	-	-
	Supplies & Materials	-	-	-	-	-
	Purchased Services	251,431	350,000	550,000	585,000	500,000
	Utilities	-	-	-	-	-
	Repair & Maintenance	-	-	-	-	-
	Capital Expenditures	-	2,060,000	665,000	665,000	500,000



# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

## COMMUNITY DEVELOPMENT

Business Unit 4330

### PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4710 Interest on Investments	\$ 2,542	\$ (317)	\$ -	\$ -	\$ -
5020 Donations & Memorials	40,157	4,834	-	-	-
5035 Other Reimbursements	-	-	-	-	-
5910 Proceeds of Long-term Debt	305,600	-	1,215,000	1,215,000	1,000,000
5921 Trans In - General Fund	-	845,330	-	-	-
Total Revenue	<u>\$ 348,299</u>	<u>\$ 849,847</u>	<u>\$ 1,215,000</u>	<u>\$ 1,215,000</u>	<u>\$ 1,000,000</u>
Expenses					
6404 Consulting Services	\$ -	\$ -	\$ 300,000	\$ 335,000	\$ -
6408 Contractor Fees	1,431	-	-	-	-
6599 Other contracts/obligations	250,000	350,000	250,000	250,000	500,000
6801 Land Acquisition	-	2,060,000	-	-	500,000
6809 Infrastructure Construction	-	-	665,000	665,000	-
7913 Trans Out - Debt Service	239,007	4,834	-	-	-
Total Expense	<u>\$ 490,438</u>	<u>\$ 2,414,834</u>	<u>\$ 1,215,000</u>	<u>\$ 1,250,000</u>	<u>\$ 1,000,000</u>

### DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

#### Other Contracts/Obligations

Appleton Redevelopment Authority \$ 500,000

#### Land

Properties for redevelopment \$ 500,000

**CITY OF APPLETON 2017 BUDGET**  
**COMMUNITY DEVELOPMENT**  
**SOURCES AND USES OF FUNDS**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Interest Income	\$ 2,542	\$ (317)	\$ -	\$ -	\$ -
Donations & Memorials	40,157	4,834	-	-	-
Other Reimbursements	-	-	-	-	-
Total Revenues	<u>42,699</u>	<u>4,517</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Expenses</b>					
Program Costs	251,431	2,410,000	1,215,000	167,000	1,000,000
Total Expenses	<u>251,431</u>	<u>2,410,000</u>	<u>1,215,000</u>	<u>167,000</u>	<u>1,000,000</u>
Revenues over (under) Expenses	(208,732)	(2,405,483)	(1,215,000)	(167,000)	(1,000,000)
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	305,600	-	1,215,000	1,730,471	1,000,000
Operating Transfers In	-	845,330	-	-	-
Operating Transfers Out	(239,007)	(4,834)	-	-	-
Total Other Financing Sources (Uses)	<u>66,593</u>	<u>840,496</u>	<u>1,215,000</u>	<u>1,730,471</u>	<u>1,000,000</u>
Net Change in Equity	(142,139)	(1,564,987)	-	1,563,471	-
Fund Balance - Beginning	<u>143,655</u>	<u>1,516</u>	<u>(1,563,471)</u>	<u>(1,563,471)</u>	<u>-</u>
Fund Balance - Ending	<u>\$ 1,516</u>	<u>\$ (1,563,471)</u>	<u>\$ (1,563,471)</u>	<u>\$ -</u>	<u>\$ -</u>



**CITY OF APPLETON 2017 BUDGET**

**TAX INCREMENTAL FINANCING DISTRICTS**

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

**Finance Director: Anthony D. Saucerman, CPA**

# CITY OF APPLETON 2017 BUDGET

## SPECIAL REVENUE FUNDS

**Tax Incremental District # 3**

**Business Unit 2040**

### PROGRAM MISSION

This program accounts for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy # 2: "Encourage active community participation and involvement."

**Objectives:**

Tax Incremental District #3 includes the area bounded by Richmond and Superior Streets, from the County Courthouse to the School Administration building.

Primary projects include the Green and Yellow Parking Ramps, the Radisson Paper Valley Hotel expansion, the Evans Title building, Angelus Assisted Living Center, the Copper Leaf Hotel, and the Richmond Terrace property. This district was scheduled to close in 2021 but in 2011 was designated as distressed as allowed by Act 310. This designation allows the extension of the district's life by up to ten years (2031) beyond the original

	General Fund Advance	Parking Utility Advance		General Fund Advance	Parking Utility Advance
1993	\$ -	\$ 129,877	2005	393,108	800,000
1994	-	604,290	2006	207,763	900,000
1995	-	703,516	2007	423,151	900,000
1996	-	1,254,622	2008	239,309	900,000
1997	639,211	764,308	2009	(568,726)	1,000,000
1998	1,141,212	787,831	2010	222,838	1,000,000
1999	1,756,773	827,222	2011	643,980	1,000,000
2000	1,774,640	868,584	2012	676,179	1,000,000
2001	1,341,515	1,568,974	2013	(417,512)	1,200,000
2002	2,235,558	969,870	2014	(1,360,888)	1,200,000
2003	1,498,145	1,892,733	2015	(1,428,932)	1,200,000
2004	1,575,103	1,338,592	2016	(1,500,379)	1,400,000
			2017	(2,000,000)	1,200,000
12/31/17 Balance				\$ 7,492,048	\$ 25,410,419

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

The City continues to not recognize interest expense on the parking fund advances as, at this time, it is deemed that funds will not be available to make such a payment. The City convened the Joint Review Board in 2011 and approved designating this district as distressed after suffering a reduction in valuation of \$15,445,800 due to State assessment procedure changes, decreases in property values, and conversion of some properties to tax-exempt status. Staff continues to encourage growth and investment in TID #3, with the recent conversion of the former Luna Lounge and Intermezzo Office to Katsuya restaurant, as well as the continued redevelopment of the former Park Central complex to Class A office space.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Unit	Programs Title	Actual		Budget			% Change *
		2014	2015	Adopted 2016	Amended 2016	2017	
	<b>Program Revenues</b>	\$ 51,928	\$ 47,922	\$ 51,000	\$ 51,000	\$ 51,000	0.00%
	<b>Program Expenses</b>	\$ 735,575	\$ 672,040	\$ 605,226	\$ 605,226	\$ 548,792	-9.32%
<b>Expenses Comprised Of:</b>							
	Personnel	-	-	-	-	-	N/A
	Administrative Expense	733,982	670,381	603,176	603,176	547,042	-9.31%
	Supplies & Materials	-	-	-	-	-	N/A
	Purchased Services	1,593	1,659	2,050	2,050	1,750	-14.63%
	Utilities	-	-	-	-	-	N/A
	Repair & Maintenance	-	-	-	-	-	N/A
	Capital Expenditures	-	-	-	-	-	N/A

\* % change from prior year adopted budget



**CITY OF APPLETON 2017 BUDGET  
SPECIAL REVENUE FUNDS**

**Tax Incremental District # 3**

**Business Unit 2040**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ 894,830	\$ 954,220	\$ 923,000	\$ 923,000	\$ 987,000
4130 Payment in Lieu of Taxes	41,111	40,044	40,000	40,000	40,000
4227 State Aid - Computers	5,684	6,149	6,000	6,000	6,000
4710 Interest on Investments	5,133	1,729	5,000	5,000	5,000
5927 Transfer In - Parking Utility	1,200,000	1,200,000	1,400,000	1,400,000	1,200,000
Total Revenue	<u>\$ 2,146,758</u>	<u>\$ 2,202,142</u>	<u>\$ 2,374,000</u>	<u>\$ 2,374,000</u>	<u>\$ 2,238,000</u>
Expenses					
6401 Accounting/Audit	\$ 1,443	\$ 1,509	\$ 1,900	\$ 1,900	\$ 1,600
6402 Legal Fees	150	150	150	150	150
6720 Interest Payments	639,112	571,068	499,621	499,621	424,602
7913 Trans Out - Debt Service	94,870	99,313	103,555	103,555	122,440
Total Expense	<u>\$ 735,575</u>	<u>\$ 672,040</u>	<u>\$ 605,226</u>	<u>\$ 605,226</u>	<u>\$ 548,792</u>

**DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000**

None

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 3**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Property Taxes	\$ 894,830	\$ 954,220	\$ 923,000	\$ 918,463	\$ 987,000
Payment in Lieu of Taxes	41,111	40,044	40,000	41,000	40,000
Intergovernmental	5,684	6,149	6,000	6,305	6,000
Interest Income	5,133	1,729	5,000	4,500	5,000
Total Revenues	<u>946,758</u>	<u>1,002,142</u>	<u>974,000</u>	<u>970,268</u>	<u>1,038,000</u>
<b>Expenses</b>					
Interest Expense	639,112	571,068	499,621	499,621	424,602
Administrative Expenses	1,593	1,659	2,050	2,050	1,750
Total Expenses	<u>640,705</u>	<u>572,727</u>	<u>501,671</u>	<u>501,671</u>	<u>426,352</u>
Revenues over (under) Expenses	306,053	429,415	472,329	468,597	611,648
<b>Other Financing Sources (Uses)</b>					
Operating Transfers In - Other Funds	1,200,000	1,200,000	1,400,000	1,400,000	1,200,000
Operating Transfers Out - Debt Service	(94,870)	(99,313)	(103,555)	(103,555)	(122,440)
Total Other Financing Sources (Uses)	<u>1,105,130</u>	<u>1,100,687</u>	<u>1,296,445</u>	<u>1,296,445</u>	<u>1,077,560</u>
Revenues over (under) Expenses	1,411,183	1,530,102	1,768,774	1,765,042	1,689,208
Fund Balance (Deficit)- Beginning	<u>(13,672,340)</u>	<u>(12,261,157)</u>	<u>(10,731,055)</u>	<u>(10,731,055)</u>	<u>(8,966,013)</u>
Fund Balance (Deficit)- Ending	<u>\$ (12,261,157)</u>	<u>\$ (10,731,055)</u>	<u>\$ (8,962,281)</u>	<u>\$ (8,966,013)</u>	<u>\$ (7,276,805)</u>

**Discussion of changes in fund balances:**

TIF #3 closed for capital expenditures as of November 4, 2003, therefore it is classified as a Special Revenue Fund. The existence of a negative fund balance in this fund is the result of capital investments in the early years of the TIF district which continue to be funded by the inflows of incremental property taxes.



**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT #3**  
**LONG TERM DEBT**

Year	2012B G.O. Refunding Bonds	
	Principal	Interest
2017	\$ 120,000	\$ 2,440
2018	125,000	875
	<u>\$ 245,000</u>	<u>\$ 3,315</u>

**CITY OF APPLETON 2017 BUDGET  
SPECIAL REVENUE FUNDS**

**NOTES**



**CITY OF APPLETON 2017 BUDGET  
CAPITAL PROJECTS FUNDS**

**NOTES**



# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Tax Incremental District # 6**

**Business Unit 4090**

### PROGRAM MISSION

TIF District #6 supports the City's southeast growth corridor, financing land assembly for both public purposes and industrial development as well as infrastructure installation to the area. This fund accounts for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy # 2: "Encourage active community participation and involvement."

**Objectives:**

The 2017 budget provides funding for the next phase of Southpoint Commerce Park and overall administration of the Park. Administrative costs include maintenance, real estate commissions, surveys, title insurance, and other costs associated with selling land and maintaining a high quality business park. Eligible expenditures may be made in this district until February 14, 2018; this district will close in 2023. Further descriptions of projects to be funded from this fund can be found in the Capital Projects section of the budget, as follows:

Project	Amount	Page
Concrete paving program	\$ 1,958,173	Projects, Pg. 572
Grade & gravel program	278,251	Projects, Pg. 578
Sidewalk program	304,000	Projects, Pg. 580
Stormwater management	212,266	Projects, Pg. 582
Southpoint Commerce Park development	135,540	Projects, Pg. 563
	<u>\$ 2,888,230</u>	

**Summary of General Fund Advance**

2010	\$ 1,025,000	2014	134,375
2011	1,877,500 *	2015	141,094
2012	145,125	2016	2,024,559
2013	(360,119)	2017	2,700,000
		12/31/17 Balance	<u>\$ 7,687,534</u>

\* \$781,707 was part of general levy for TIF #6 debt service in 2011 Debt Service Fund.

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

The farm lease for vacant business park land is based on \$210 an acre lease rate, which is 144 acres in 2016. It is anticipated the leasable land will decrease from 144 acres in 2016 to 142.4 acres in 2017 with the extension of Millis Drive from Alliance to Eisenhower Drive. 80% of the lease revenue is payable to the IPLF and 20% is in TIF #6.

The 2016 - 2017 budgets provide funding to extend Vantage Drive from Lakeland Drive to Eisenhower Drive and Millis Drive from Alliance Drive to Eisenhower Drive as the next phase for Southpoint and the final phase that would be paid for by TIF #6. This would include City utility infrastructure in 2016 and non-City utility infrastructure and paving in 2017. Non-City infrastructure includes gas, electric, cable service, and street lights. Funding in 2018 and beyond would be for maintenance of the Park that will come from the Industrial Park Land Fund while TIF #6 recaptures the investments it's made in this District. The City will evaluate the need for additional infrastructure and platting of the land for the Park and will determine at a later date if a new TIF District will be created in 2018 or beyond to fund these costs.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget		% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	
<b>Program Revenues</b>		\$ 107,035	\$ 75,000	\$ 165,880	\$ 165,880	23.88%
<b>Program Expenses</b>		\$ 2,688,770	\$ 2,506,022	\$ 3,600,443	\$ 3,600,443	45.78%
<b>Expenses Comprised Of:</b>						
Personnel		14,905	13,629	13,657	13,657	571.88%
Administrative Expense		1,946,121	1,973,346	1,563,478	1,563,478	19.30%
Supplies & Materials		89,858	-	-	-	N/A
Purchased Services		626,840	502,510	482,450	482,450	2.61%
Utilities		-	-	325	325	0.00%
Repair & Maintenance		11,046	253	3,500	3,500	0.00%
Other Capital Expenditures		-	16,284	1,537,033	1,537,033	81.71%



# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Tax Incremental District # 6**

**Business Unit 4090**

### PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
<b>Revenues</b>					
4110 Property Taxes	\$ 2,614,263	\$ 2,203,729	\$ 2,150,000	\$ 2,150,000	\$ 2,200,000
4227 State Aid - Computers	81,739	65,677	65,000	65,000	60,000
4710 Interest on Investments	16,329	3,149	15,000	15,000	5,000
5004 Sale of City Prop - Nontax	-	-	80,000	80,000	135,000
5015 Rental of City Property	8,967	6,174	5,880	5,880	5,500
5910 Proceeds of Long Term Debt	-	-	1,232,156	1,232,156	- *
<b>Total Revenue</b>	<b>\$ 2,721,298</b>	<b>\$ 2,278,729</b>	<b>\$ 3,548,036</b>	<b>\$ 3,548,036</b>	<b>\$ 2,405,500</b>
<b>Expenses</b>					
6101 Regular Salaries	\$ 10,476	\$ 10,047	\$ 9,820	\$ 9,820	\$ 73,283
6105 Overtime	661	-	306	306	466
6108 Part-Time	-	200	1,111	1,111	1,382
6150 Fringes	3,768	3,382	2,420	2,420	16,627
6309 Shop Supplies & Tools	40	-	-	-	-
6325 Construction Materials	89,818	-	-	-	-
6401 Accounting/Audit	1,443	1,509	1,900	1,900	1,600
6402 Legal Fees	150	184	150	150	150
6404 Consulting Services	-	-	5,000	5,000	5,000
6408 Contractor Fees	16,665	-	-	-	-
6413 Utilities	-	-	325	325	325
6425 CEA Equip. Rental	11,046	253	3,500	3,500	3,500
6599 Other Contracts/Obligations	608,582	500,817	475,400	475,400	488,300
6720 Interest Payments	134,375	141,094	135,648	135,648	316,877
6809 Infrastructure Construction	-	16,284	1,537,033	1,537,033	2,792,971
7913 Trans Out - Debt Service	1,811,746	1,832,252	1,427,830	1,427,830	1,548,287
<b>Total Expense</b>	<b>\$ 2,688,770</b>	<b>\$ 2,506,022</b>	<b>\$ 3,600,443</b>	<b>\$ 3,600,443</b>	<b>\$ 5,248,768</b>

### DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

#### Other Contracts/Obligations

Weed cutting/maintenance/debris clean up/ stockpile relocation for Southpoint	\$ 32,500
Real estate commission (3 acres)	10,800
Developer funded incentive - Time Warner Cable	445,000
	<u>\$ 488,300</u>

#### Infrastructure Construction

Sanitary Area Assessment	
Site grading/preparation for roadway	
Non-city utilities for Vantage Drive and Milis Drive	\$ 135,540
Vantage Drive:	
Concrete paving program	489,715
Grade & gravel program	115,101
Eisenhower Drive:	
Concrete paving program	889,245
Milis Drive:	
Concrete paving program	420,220
Grade & gravel program	155,150
Coop Road stormwater pond	200,000
Sidewalk program	298,000
Midway Rd roundabout	90,000
	<u>\$ 2,792,971</u>

\* 2016 and 2017 projects actually funded by advances from the general fund

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 6**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

<b>Revenues</b>	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
Property Taxes	\$ 2,164,263	\$ 2,203,729	\$ 2,150,000	\$ 2,090,076	\$ 2,200,000
Intergovernmental	81,739	65,677	65,000	55,758	60,000
Interest Income	16,329	3,149	15,000	3,000	5,000
Other	8,967	6,174	5,880	5,880	5,500
Total Revenues	<u>2,271,298</u>	<u>2,278,729</u>	<u>2,235,880</u>	<u>2,154,714</u>	<u>2,270,500</u>
<b>Expenses</b>					
Capital Outlay	741,056	531,017	2,034,915	2,675,956	3,381,854
Interest Expense	134,375	141,094	135,648	171,314	316,877
Administrative Expense	1,593	1,659	2,050	2,050	1,750
Total Expenses	<u>877,024</u>	<u>673,770</u>	<u>2,172,613</u>	<u>2,849,320</u>	<u>3,700,481</u>
Revenues over (under) Expenses	1,394,274	1,604,959	63,267	(694,606)	(1,429,981)
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	-	-	1,232,156	-	-
Operating Transfers Out - Debt Service	(1,811,746)	(1,832,252)	(1,427,830)	(1,427,830)	(1,548,287)
Sale of City Property	-	-	80,000	329,400	135,000
Total Other Financing Sources (Uses)	<u>(1,811,746)</u>	<u>(1,832,252)</u>	<u>(115,674)</u>	<u>(1,098,430)</u>	<u>(1,413,287)</u>
Net Change in Equity	(417,472)	(227,293)	(52,407)	(1,793,036)	(2,843,268)
Fund Balance - Beginning	(2,061,180)	(2,478,652)	(2,705,945)	(2,705,945)	(4,498,981)
Residual Equity Transfers Out	-	-	-	-	-
Fund Balance - Ending	<u>\$ (2,478,652)</u>	<u>\$ (2,705,945)</u>	<u>\$ (2,758,352)</u>	<u>\$ (4,498,981)</u>	<u>\$ (7,342,249)</u>

**SCHEDULE OF CASH FLOWS**

Cash - Beginning of Year	\$ 257,030	\$ 488,553
- Net Change in Equity	(1,793,036)	(2,843,268)
+ Advance from General Fund	2,024,559	2,700,000
- General Fund Advance Repayment	-	-
Working Cash - End of Year	<u>\$ 488,553</u>	<u>\$ 345,285</u>



**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 6**  
**LONG TERM DEBT**

Year	2007A G.O. Notes	
	Principal	Interest
2017	305,000	6,481
	<u>\$ 305,000</u>	<u>\$ 6,481</u>

Year	2008A G.O. Notes		2009A G.O. Notes	
	Principal	Interest	Principal	Interest
2017	460,000	28,100	350,000	27,763
2018	480,000	9,600	365,000	17,038
2019	-	-	370,000	5,781
	<u>\$ 940,000</u>	<u>\$ 37,700</u>	<u>\$ 1,085,000</u>	<u>\$ 50,582</u>

Year	2012B G.O. Refunding Bonds		TOTAL		
	Principal	Interest	Principal	Interest	Total
2017	360,000	10,943	1,475,000	73,287	1,548,287
2018	255,000	7,087	1,100,000	33,725	1,133,725
2019	180,000	3,772	550,000	9,553	559,553
2020	115,000	1,121	115,000	1,121	116,121
	<u>\$ 910,000</u>	<u>\$ 22,923</u>	<u>\$ 3,240,000</u>	<u>\$ 117,686</u>	<u>\$ 3,357,686</u>

# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Tax Incremental District # 7**

**Business Unit 4100**

### PROGRAM MISSION

This fund provides for commercial redevelopment of the area of South Memorial Drive from Calumet Street to Valley Road and for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy # 2: "Encourage active community participation and involvement."

**Objectives:**

The area of South Memorial Drive from Calumet Street to State Highway 441 had deteriorated significantly over the last ten years. The abandonment of Valley Fair Mall and the under utilization of former retail and service buildings was cause for concern. The City created TIF District #7 in 2007 to provide targeted investments in this commercial corridor in conjunction with the private market while recapturing the cost of participation through the increased property tax revenues. The TIF District provides for a 22 year expenditure period (September 5, 2029) to make investments to support the goals of the District, including eliminating blight and encouraging the rehabilitation of properties, enhancing the viability of the businesses, retention of businesses and attraction of new businesses, stabilizing and increasing property values and improving the overall appearance of public and private spaces. The maximum life of the District is September 5, 2034.

Major commercial projects which have occurred thus far (not all received TIF assistance) include construction of a grocery store, a gas station/convenience store, and renovation of a former department store to office space. Three businesses also benefited from the creation of the TIF #7 Business Enhancement Grant program for the renovation of building facades, parking lots, landscaping and signage. In 2015, Secura Insurance began leasing the former Kohl's department store that had been vacant for years.

No new funds are being requested for the program in 2017.

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

No major changes.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	2017	
<b>Program Revenues</b>		\$ 65,748	\$ 45,827	\$ 56,000	\$ 56,000	\$ 55,600	-0.71%
<b>Program Expenses</b>		\$ 262,592	\$ 308,596	\$ 313,575	\$ 313,575	\$ 408,050	30.13%
<b>Expenses Comprised Of:</b>							
	Personnel	-	-	-	-	-	N/A
	Administrative Expense	1,525	1,525	1,525	1,525	16,300	968.85%
	Supplies & Materials	-	-	-	-	-	N/A
	Purchased Services	261,067	307,071	312,050	312,050	391,750	25.54%
	Utilities	-	-	-	-	-	N/A
	Repair & Maintenance	-	-	-	-	-	N/A
	Capital Expenditures	-	-	-	-	-	N/A



# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

**Tax Incremental District # 7**

**Business Unit 4100**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ 259,474	\$ 320,373	\$ 315,000	\$ 315,000	\$ 447,000
4227 State Aid - Computers	59,372	43,179	50,000	50,000	50,000
4710 Interest on Investments	6,376	2,648	6,000	6,000	5,600
5910 Proceeds of Long-term Debt	-	-	-	-	-
Total Revenue	<u>\$ 325,222</u>	<u>\$ 366,200</u>	<u>\$ 371,000</u>	<u>\$ 371,000</u>	<u>\$ 502,600</u>
Expenses					
6401 Accounting/Audit	\$ 1,443	\$ 1,509	\$ 1,900	\$ 1,900	\$ 1,600
6402 Legal Fees	150	150	150	150	150
6425 CEA Equip. Rental	-	-	-	-	-
6599 Other Contracts/Obligations	259,474	305,412	310,000	310,000	390,000
6809 Infrastructure Construction	-	-	-	-	-
7913 Trans Out - Debt Service	1,525	1,525	1,525	1,525	16,300
Total Expense	<u>\$ 262,592</u>	<u>\$ 308,596</u>	<u>\$ 313,575</u>	<u>\$ 313,575</u>	<u>\$ 408,050</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

### Other Contracts/Obligations

Developer funded incentive -  
Valley Fair Too, LLC

\$ 390,000

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 7**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

<b>Revenues</b>	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
Property Taxes	\$ 259,474	\$ 320,373	\$ 315,000	\$ 310,168	\$ 447,000
Intergovernmental	59,372	43,179	50,000	46,569	50,000
Interest Income	6,376	2,648	6,000	7,500	5,600
Other	-	-	-	-	-
Total Revenues	<u>325,222</u>	<u>366,200</u>	<u>371,000</u>	<u>364,237</u>	<u>502,600</u>
<b>Expenses</b>					
Capital Outlay	259,474	305,412	310,000	304,614	390,000
Administrative Expense	1,593	1,659	2,050	1,750	1,750
Total Expenses	<u>261,067</u>	<u>307,071</u>	<u>312,050</u>	<u>306,364</u>	<u>391,750</u>
Revenues over (under) Expenses	64,155	59,129	58,950	57,873	110,850
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	-	-	-	-	-
Operating Transfers In	-	-	-	-	-
Operating Transfers Out	(1,525)	(1,525)	(1,525)	(1,525)	(16,300)
Total Other Financing Sources (Uses)	<u>(1,525)</u>	<u>(1,525)</u>	<u>(1,525)</u>	<u>(1,525)</u>	<u>(16,300)</u>
Net Change in Equity	62,630	57,604	57,425	56,348	94,550
Fund Balance (Deficit) - Beginning	383,862	446,492	504,096	504,096	560,444
Residual Equity Transfers In (Out)	-	-	-	-	-
Fund Balance (Deficit) - Ending	<u>\$ 446,492</u>	<u>\$ 504,096</u>	<u>\$ 561,521</u>	<u>\$ 560,444</u>	<u>\$ 654,994</u>



**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 7**  
**LONG TERM DEBT**

Year	2009A G.O. Notes	
	Principal	Interest
2017	15,000	1,300
2018	15,000	850
2019	20,000	313
	<u>\$ 50,000</u>	<u>\$ 5,513</u>

# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Tax Incremental District # 8**

**Business Unit 4110**

### PROGRAM MISSION

This fund provides for redevelopment to eliminate blight and stimulate the redevelopment of the river corridor in an area that lies just north and south of the College Avenue Bridge and for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy # 2: "Encourage active community participation and involvement."

**Objectives:**

The City's updated Comprehensive Plan 2010-2030, including the Downtown Plan and Fox River chapters, has identified several redevelopment sites located along the banks of the Fox River, as well as the opportunities the opening of the Fox River Navigation System will provide the community. Several key sites include the former Foremost Dairy property (935 E. John Street) on the north side of the river, RiverHeath on the south, and the Eagle Flats property up the Fox River between Lawe Street and Olde Oneida Street. These sites have been identified for future medium to high density residential development, neighborhood commercial development, and public access to the river.

The City created Tax Increment Financing (TIF) District # 8 in 2009 to provide targeted investments in this area, in conjunction with the private market, while recapturing the cost of participation through increased property tax revenues. The District was amended in 2011 to incorporate the Eagle Flats property, formerly Riverside Paper mill. The TIF District provides for a 22 year expenditure period to make investments to support the goals of the District, including eliminating blight and encouraging the rehabilitation of properties, enhancing the viability of businesses, retaining and attracting new businesses, stabilizing and increasing property values, and improving the overall appearance of public and private spaces.

Summary of Advances	General Fund
2012	\$ 315,000
2013	515,750
2014	41,538
2015	43,614
2016	45,795
2017	-
12/31/17 Balance	<u>\$ 961,697</u>

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

No major changes.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget		% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	
	<b>Program Revenues</b>	\$ 38,169	\$ 27,509	\$ 51,760	\$ 51,760	\$ 414,198 700.23%
	<b>Program Expenses</b>	\$ 798,114	\$ 285,966	\$ 372,069	\$ 719,069	\$ 817,626 119.75%
<b>Expenses Comprised Of:</b>						
	Personnel	12,401	-	-	-	N/A
	Administrative Expense	126,337	82,372	101,019	101,019	505,876 400.77%
	Supplies & Materials	23,795	-	-	-	N/A
	Purchased Services	265,039	193,594	271,050	271,050	311,750 15.02%
	Utilities	-	-	-	-	N/A
	Repair & Maintenance	-	-	-	-	N/A
	Capital Expenditures	370,542	10,000	-	347,000	-



# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

**Tax Incremental District # 8**

**Business Unit 4110**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ 105,905	\$ 236,264	\$ 275,000	\$ 275,000	\$ 328,000
4227 State Aid - Computers	2,302	1,755	2,000	2,000	3,500
4705 General Interest	34,210	25,711	49,760	49,760	49,760
4710 Interest on Investments	1,657	43	-	-	-
5030 Other Reimbursements	-	-	-	-	360,938
5910 Proceeds of Long-term Debt	500,000	360,000	-	-	-
Total Revenue	<u>\$ 644,074</u>	<u>\$ 623,773</u>	<u>\$ 326,760</u>	<u>\$ 326,760</u>	<u>\$ 742,198</u>
Expenses					
6101 Regular Salaries	\$ 8,576	\$ -	\$ -	\$ -	\$ -
6105 Overtime	156	-	-	-	-
6108 Part Time	788	-	-	-	-
6150 Fringes	2,881	-	-	-	-
6325 Construction Materials	23,795	-	-	-	-
6401 Accounting/Audit	4,443	1,509	1,900	1,900	1,600
6402 Legal Fees	150	150	150	150	150
6404 Consulting	16,269	-	-	-	-
6408 Contractor Fees	8,098	-	-	-	-
6599 Other Contracts/Obligations	236,079	191,935	269,000	269,000	310,000
6720 Interest Payments	33,269	43,614	45,795	45,795	48,085
6809 Infrastructure Construction	370,542	10,000	-	347,000	-
7913 Trans Out - Debt Service	93,068	38,758	55,224	55,224	457,791
Total Expense	<u>\$ 798,114</u>	<u>\$ 285,966</u>	<u>\$ 372,069</u>	<u>\$ 719,069</u>	<u>\$ 817,626</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

### Other Contracts/Obligations

Tax Development Payment

RiverHeath

Eagle Flats

\$ 240,000

70,000

\$ 310,000

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 8**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Property Taxes	\$ 105,905	\$ 236,264	\$ 275,000	\$ 262,671	\$ 328,000
Intergovernmental Revenue	2,302	1,755	2,000	3,527	3,500
Other Reimbursements	-	-	-	-	360,938
Interest Income	35,867	25,753	49,760	55,000	49,760
Total Revenues	<u>144,074</u>	<u>263,772</u>	<u>326,760</u>	<u>321,198</u>	<u>742,198</u>
<b>Expenses</b>					
Program Costs	667,184	201,935	269,000	266,310	310,000
Interest Expense	33,269	43,614	45,795	45,795	48,085
Administration	4,593	1,659	2,050	2,050	1,750
Total Expenses	<u>705,046</u>	<u>247,208</u>	<u>316,845</u>	<u>314,155</u>	<u>359,835</u>
Revenues over (under) Expenses	(560,972)	16,564	9,915	7,043	382,363
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	500,000	360,000	-	-	-
Sale of City Property	-	-	-	-	-
Operating Transfers In	-	-	-	-	-
Operating Transfers Out	(93,068)	(38,758)	(55,224)	(55,224)	(457,791)
Total Other Financing Sources (Uses)	<u>406,932</u>	<u>321,242</u>	<u>(55,224)</u>	<u>(55,224)</u>	<u>(457,791)</u>
Net Change in Equity	(154,040)	337,806	(45,309)	(48,181)	(75,428)
Fund Balance - Beginning	<u>(761,437)</u>	<u>(915,477)</u>	<u>(577,671)</u>	<u>(577,671)</u>	<u>(625,852)</u>
Fund Balance - Ending	<u>\$ (915,477)</u>	<u>\$ (577,671)</u>	<u>\$ (622,980)</u>	<u>\$ (625,852)</u>	<u>\$ (701,280)</u>



**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 8**  
**LONG TERM DEBT**

Year	2009A G.O. Notes		2012A G.O. Notes <sup>1</sup>	
	Principal	Interest	Principal	Interest
2017	10,000	918	360,938	18,391
2018	10,000	618	367,812	11,103
2019	15,000	234	371,250	3,712
	<u>\$ 35,000</u>	<u>\$ 1,770</u>	<u>\$ 1,100,000</u>	<u>\$ 33,206</u>

Year	2012 DNR Site Remediation Loan		2014 G.O. Notes <sup>1</sup>	
	Principal	Interest	Principal	Interest
2017	15,000	-	-	10,100
2018	25,000	-	-	10,100
2019	25,000	-	165,000	8,450
2020	35,000	-	170,000	5,100
2021	35,000	-	170,000	1,700
2022	45,000	-	-	-
2023	45,000	-	-	-
2024	50,000	-	-	-
	<u>\$ 275,000</u>	<u>\$ -</u>	<u>\$ 505,000</u>	<u>\$ 35,450</u>

Year	2015 G.O. Notes		Total		
	Principal	Interest	Principal	Interest	Total
2017	35,000	7,444	420,938	36,853	457,791
2018	35,000	7,024	437,812	28,845	466,657
2019	40,000	6,487	616,250	18,883	635,133
2020	40,000	5,828	245,000	10,928	255,928
2021	40,000	5,047	245,000	6,747	251,747
2022	40,000	4,138	85,000	4,138	89,138
2023	40,000	3,117	85,000	3,117	88,117
2024	45,000	1,958	95,000	1,958	96,958
2025	45,000	664	45,000	664	45,664
	<u>\$ 360,000</u>	<u>\$ 41,707</u>	<u>\$ 2,275,000</u>	<u>\$ 112,133</u>	<u>\$2,387,133</u>

<sup>1</sup> The City borrowed a total of \$1,600,000 on behalf of Riverheath in two installments with the 2012 and 2014 G.O. issues. Debt service on that borrowing is paid by Riverheath and is included in the transfer out to debt service.

# CITY OF APPLETON 2017 BUDGET

## CAPITAL PROJECTS FUNDS

**Tax Incremental District # 9**

**Business Unit 4120**

### PROGRAM MISSION

This fund provides for redevelopment to eliminate blight and stimulate the redevelopment of the business and industrial corridor located along East Wisconsin Avenue from Meade Street to Viola Street for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

### PROGRAM NARRATIVE

**Link to City Goals:**

Implements Key Strategy # 2: "Encourage active community participation and involvement."

**Objectives:**

The district was created 9/19/13 and allows a 22 year expenditure period to make investments. Costs can be recouped over the 27 year maximum life (9/18/2040). The investment in this district will:

- \* Eliminate blight and foster urban renewal through public and private investment
- \* Enhance the development potential of private property within and adjacent to the district
- \* Stabilize property values in the area
- \* Promote business retention, expansion, and attraction through the development of an improved area
- \* Increase the attraction of compatible residential and business uses in this area
- \* Improve the overall appearance of public and private spaces
- \* Strengthen the economic well-being and economic diversity of the area
- \* Provide appropriate financial incentives to encourage business expansion and retention
- \* Reduce the financial risks to the taxpayer by timing the implementation of the project plan with the creation of additional property value
- \* Maximize the district's strategic location close to the central business district

Projects to be funded from this fund can be found in the Capital Projects section of the budget, as follows:

Project	Amount	Page
No projects are planned for TIF # 9 in 2017		

Summary of Advances	General Fund
2013	\$ 1,025
2014	182,301
2015	(93,334)
2016	4,500
2017	(94,492)
12/31/17 Balance	<u>\$ -</u>

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

2017 is the first year of the developer incentive payment for the Union Square Apartment complex.

### PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget		% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	
<b>Program Revenues</b>		\$ -	\$ 68,591	\$ 66,000	\$ 66,000	7.58%
<b>Program Expenses</b>		\$ 128,494	\$ 8,325	\$ 86,221	\$ 86,221	-58.54%
<b>Expenses Comprised Of:</b>						
Personnel		9,288	-	2,205	2,205	-100.00%
Administrative Expense		2,301	6,666	4,500	4,500	-100.00%
Supplies & Materials		-	-	-	-	N/A
Purchased Services		2,565	1,659	2,050	2,050	1643.90%
Utilities		-	-	-	-	N/A
Repair & Maintenance		1,325	-	-	-	N/A
Capital Expenditures		113,015	-	77,466	77,466	-100.00%



# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

**Tax Incremental District # 9**

**Business Unit 4120**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ -	\$ 30,965	\$ 35,000	\$ 35,000	\$ 42,000
4227 State Aid - Computers	-	68,133	65,000	65,000	70,000
4710 Interest on Investments	-	458	1,000	1,000	1,000
Total Revenue	<u>\$ -</u>	<u>\$ 99,556</u>	<u>\$ 101,000</u>	<u>\$ 101,000</u>	<u>\$ 113,000</u>
Expenses					
6101 Regular Salaries	\$ 6,660	\$ -	\$ 1,675	\$ 1,675	\$ -
6150 Fringes	2,627	-	530	530	-
6401 Accounting/Audit	1,444	1,509	1,900	1,900	1,600
6402 Legal Fees	150	150	150	150	150
6404 Consulting	972	-	-	-	-
6425 CEA Equipment Rental	1,325	-	-	-	-
6599 Other Contracts/Obligations	-	-	-	-	34,000
6720 Interest Payments	2,301	6,666	4,500	4,500	-
6809 Infrastructure Construction	113,015	-	77,466	77,466	-
Total Expense	<u>\$ 128,494</u>	<u>\$ 8,325</u>	<u>\$ 86,221</u>	<u>\$ 86,221</u>	<u>\$ 35,750</u>

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

### Other Contracts/Obligations

Developer funded incentive -  
Union Square Apartments

\$	34,000
<u>\$</u>	<u>34,000</u>

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 9**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
<b>Revenues</b>					
Property Taxes	\$ -	\$ 30,965	\$ 35,000	\$ 33,007	\$ 42,000
Intergovernmental Revenue	-	68,133	65,000	70,031	70,000
Interest Income	-	458	1,000	1,000	1,000
Total Revenues	-	99,556	101,000	104,038	113,000
<b>Expenses</b>					
Program Costs	124,599	-	79,671	79,671	34,000
Administration	1,594	1,659	2,050	2,050	1,750
Total Expenses	126,193	1,659	81,721	81,721	35,750
Revenues over (under) Expenses	(126,193)	97,897	19,279	22,317	77,250
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	-	-	-	-	-
Interest Payments	(2,301)	(6,666)	(4,500)	(4,500)	-
Operating Transfers In	-	-	-	-	-
Total Other Financing Sources (Uses)	(2,301)	(6,666)	(4,500)	(4,500)	-
Net Change in Equity	(128,494)	91,231	14,779	17,817	77,250
Fund Balance - Beginning	(1,025)	(129,519)	(38,288)	(38,288)	(20,471)
Residual Equity Transfers In (Out)	-	-	-	-	-
Fund Balance - Ending	\$ (129,519)	\$ (38,288)	\$ (23,509)	\$ (20,471)	\$ 56,779

**SCHEDULE OF CASH FLOWS**

Cash - Beginning of Year	\$ 51,704	\$ 74,021
+ Net Change in Equity	17,817	77,250
+ Advance from General Fund	4,500	-
- General Fund Advance Repayment	-	(94,492)
Working Cash - End of Year	\$ 74,021	\$ 56,779



**CITY OF APPLETON 2017 BUDGET  
CAPITAL PROJECTS FUNDS**

**NOTES**

# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

**Tax Incremental District # 10**

**Business Unit 4130**

## PROGRAM MISSION

This fund provides for redevelopment to eliminate blight and stimulate the redevelopment of the northside of the West College Avenue corridor from Lilas Drive to Linwood Avenue and for the receipt of district "incremental" property taxes and other revenues, along with the corresponding program expenditures.

## PROGRAM NARRATIVE

### Link to City Goals:

Implements Key Strategy # 2: "Encourage active community participation and involvement."

### Objectives:

The district was created 9/19/13 and allows a 22 year expenditure period to make investments. Costs can be recouped over the 27 year maximum life (9/18/2040). The investment in this district will:

- \* Eliminate blight and foster urban renewal through public and private investment
- \* Enhance the development potential of private property within and adjacent to the district
- \* Stabilize property values in the area
- \* Promote retention, expansion, and attraction of businesses through the development of an improved area thereby facilitating the creation of new jobs and increased tax base
- \* Improve the overall appearance of public and private spaces
- \* Strengthen the economic well-being and economic diversity of the area
- \* Provide appropriate financial incentives to encourage business expansion
- \* Maximize the district's strategic location with easy access to both Appleton's downtown and the large retail center along U.S. Highway 41

The largest building in TIF District #10 is the Marketplace Commercial Center. Built in 1964 and added to in 1988, it has experienced significant vacancies for several years. The largest vacant parcel in this District is the 12 acre former K-Mart site. The K-Mart store was demolished in 2008, leaving a blighted, vacant parcel. CVS Pharmacy vacated their 17,000 square foot building in 2009 and it remains unoccupied. These sites and buildings are poised for commercial redevelopment/rehabilitation, being located along the gateway to Appleton with easy access to U.S. Highway 41 and Appleton's downtown. The City continues to work cooperatively with the owners to analyze and consider options to provide appropriate development incentives for this area.

Projects to be funded from this fund can be found in the Capital Projects section of the budget, as follows:

Project	Amount	Page
No projects are planned for TIF 10 in 2017		

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

No major changes.

## PERFORMANCE INDICATORS

Actual 2014   Actual 2015   Target 2016   Projected 2016   Target 2017

Note: Since this program exists solely to account for capital investments and incremental property tax receipts, there are no applicable performance measures.

## DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget			% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	2017	
	<b>Program Revenues</b>	\$ -	\$ 3,142	\$ 3,000	\$ 3,000	\$ 5,000	66.67%
	<b>Program Expenses</b>	\$ 1,644	\$ 1,659	\$ 2,050	\$ 2,050	\$ 1,750	-14.63%
<b>Expenses Comprised Of:</b>							
	Personnel	-	-	-	-	-	N/A
	Administrative Expense	51	-	-	-	-	N/A
	Supplies & Materials	-	-	-	-	-	N/A
	Purchased Services	1,593	1,659	2,050	2,050	1,750	-14.63%
	Utilities	-	-	-	-	-	N/A
	Repair & Maintenance	-	-	-	-	-	N/A
	Capital Expenditures	-	-	-	-	-	N/A



# CITY OF APPLETON 2017 BUDGET CAPITAL PROJECTS FUNDS

**Tax Incremental District # 10**

**Business Unit 4130**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2014	2015	Adopted 2016	Amended 2016	2017
Revenues					
4110 Property Taxes	\$ -	\$ 33,247	\$ 12,000	\$ 12,000	\$ 37,000
4227 State Aid - Computers	-	3,102	3,000	3,000	5,000
4910 Interest Income	-	40	-	-	-
5910 Proceeds of Debt	-	-	-	-	-
Total Revenue	\$ -	\$ 36,389	\$ 15,000	\$ 15,000	\$ 42,000
Expenses					
6101 Regular Salaries	\$ -	\$ -	\$ -	\$ -	\$ -
6150 Fringes	-	-	-	-	-
6401 Accounting/Audit	-	1,509	1,900	1,900	1,600
6402 Legal Fees	1,443	150	150	150	150
6404 Consulting	150	-	-	-	-
6720 Interest Payments	51	-	-	-	-
6809 Infrastructure Construction	-	-	-	-	-
Total Expense	\$ 1,644	\$ 1,659	\$ 2,050	\$ 2,050	\$ 1,750

## DETAILED SUMMARY OF 2017 PROPOSED EXPENDITURES > \$15,000

None

**CITY OF APPLETON 2017 BUDGET**  
**TAX INCREMENTAL DISTRICT # 10**  
**SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE (DEFICIT)**

<b>Revenues</b>	2014 Actual	2015 Actual	2016 Budget	2016 Projected	2017 Budget
Property Taxes	\$ -	\$ 33,247	\$ 12,000	\$ 11,924	\$ 37,000
Intergovernmental Revenue	-	3,102	3,000	4,967	5,000
Interest on Investments	-	40	-	500	-
Total Revenues	-	36,389	15,000	17,391	42,000
<b>Expenses</b>					
Program Costs	-	-	-	-	-
Administration	1,593	1,659	2,050	2,050	1,750
Total Expenses	1,593	1,659	2,050	2,050	1,750
Revenues over (under) Expenses	(1,593)	34,730	12,950	15,341	40,250
<b>Other Financing Sources (Uses)</b>					
Proceeds of G.O. Debt	-	-	-	-	-
Interest Payments	(51)	-	-	-	-
Operating Transfers In	-	-	-	-	-
Operating Transfers Out	-	-	-	-	-
Total Other Financing Sources (Uses)	(51)	-	-	-	-
Net Change in Equity	(1,644)	34,730	12,950	15,341	40,250
Fund Balance - Beginning	(1,025)	(2,669)	32,061	32,061	47,402
Residual Equity Transfers In (Out)	-	-	-	-	-
Fund Balance - Ending	\$ (2,669)	\$ 32,061	\$ 45,011	\$ 47,402	\$ 87,652



# CITY OF APPLETON 2017 BUDGET CAPITAL IMPROVEMENTS PROGRAM PROJECT REQUEST

## IDENTIFICATION

**Project Title:** Miscellaneous Site Acquisition and Projects - Appleton Redevelopment Authority (ARA)

## PROJECT DESCRIPTION

**Justification:**

The focus of the ARA is to promote economic and community development by investing in and growing the community by eliminating blighted areas throughout the community. The goal of ARA is to provide for redevelopment activities throughout the City as necessary to maintain and enhance viable residential, commercial and industrial development.

The City's updated Comprehensive Plan 2010-2030, including the downtown plan and Fox River plan chapters, and the economic development strategic plan have identified areas where redevelopment may be appropriate. The ability of the City to acquire properties in these areas as they become available will enhance our ability to influence meaningful redevelopment. Supporting the retention, growth and long-term economic vitality of Appleton's businesses is also a priority.

This request is for funding Appleton Redevelopment Authority to complete next steps in the redevelopment of properties and projects that become available within areas of the City that are in need of redevelopment. These redevelopment projects will become part of a developed plan to revive depressed areas of the City. Funding is requested for acquisition, demolition and site preparation activities, including infrastructure improvements, planning, consulting and analysis to support redevelopment projects and brownfield mitigation. Due to the confidential nature of the preliminary development stages, the specific locations cannot be shared at this time.

**Discussion of operating cost impact:**

The final impact on operating costs is undetermined at this time since the properties and the final use for the properties has not been finalized.

## DEPARTMENT COST SUMMARY

DEPARTMENT PHASE		2017	2018	2019	2020	2021	Total
Community Development	Legal, planning, consulting,						
	site acquisition	250,000	250,000	350,000	-	-	\$ 850,000
	Demolition, site prep, infrastructure	250,000	-	-	-	-	\$ 250,000
Total - Community Development Capital Projects Fund		\$ 500,000	\$ 250,000	\$ 350,000	\$ -	\$ -	\$ 1,100,000

## COST ANALYSIS

### Estimated Cash Flows

Components	2017	2018	2019	2020	2021	Total
Planning	-	250,000	-	-	-	\$ 250,000
Land Acquisition	250,000	-	350,000	-	-	\$ 600,000
Construction	250,000	-	-	-	-	\$ 250,000
Other	-	-	-	-	-	\$ -
Total	\$ 500,000	\$ 250,000	\$ 350,000	\$ -	\$ -	\$ 1,100,000
Operating Cost Impact	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

# CITY OF APPLETON 2017 BUDGET CAPITAL IMPROVEMENTS PROGRAM PROJECT REQUEST

## IDENTIFICATION

Project Title: TIF District # 6/IPLF - Southpoint Commerce Park

## PROJECT DESCRIPTION

### Justification:

This project comprises infrastructure development for the Southpoint Commerce Park in the southeast growth area of the City. The 359-acre site will be developed in several phases over the next several decades. The first half of the Park will be developed using the Tax Incremental District #6 (TIF #6) created in 2000. The TIF #6 Plan projects the district will create \$75 million in tax base. Job creation and retention will also be significant.

The 2016 - 2017 budgets provide funding to extend Vantage Drive from Lakeland Drive to Eisenhower Drive and Milis Drive from Alliance Drive to Eisenhower Drive as the next phase for Southpoint and the final phase that would be paid for by TIF #6. This would include City utility infrastructure work in 2016 and non-City utility infrastructure and paving in 2017. Non-City infrastructure includes gas, electric, cable service, and street lights. Funding in 2018 and beyond is for maintenance of the Park that will come from the Industrial Park Land Fund while TIF #6 recaptures the investments it's made in this District. The City will evaluate the need for additional infrastructure and platting of the land for the Park and will determine at a later date if a new TIF District will be created in 2018 or beyond to fund these costs. Eligible expenditures may be made in TIF #6 until February 14, 2018.

\$25,000 is included for consulting services to complete a feasibility analysis of the City creating a wetland mitigation bank, which are restored, enhanced or created wetlands whose purpose is to provide credits to offset unavoidable impacts to existing wetlands. Currently the DNR imposes a mitigation fee for impacted wetlands. The potential for the City to manage its own bank for projects could save money in the long-term. The feasibility analysis would be the first step in this process.

City infrastructure not included in cost summary below for 2017 includes:

	TIF # 6	Industrial Park Land Fund	Project Page
Concrete paving program	\$ 1,958,173	184,441	Page 572
Grade & gravel program	278,251	-	Page 578
Sidewalk program	304,000	-	Page 580
Storm Sewer construction	212,266	-	Page 582
	<u>\$ 2,752,690</u>	<u>\$ 184,441</u>	

### Discussion of operating cost impact:

No major impacts.

## DEPARTMENT COST SUMMARY

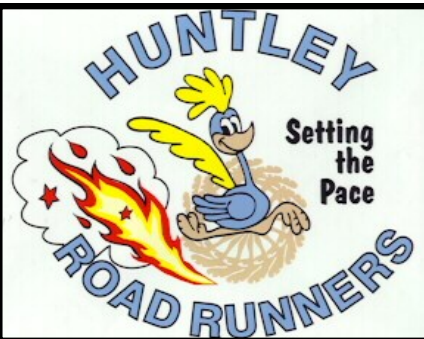
DEPARTMENT PHASE	2017	2018	2019	2020	2021	Total
Comm Dev Administration	25,000	29,725	29,725	29,725	-	\$ 114,175
Comm Dev San. Area Assess.	-	43,929	-	94,286	-	\$ 138,215
<b>Industrial Park Land Fund</b>	<b>25,000</b>	<b>73,654</b>	<b>29,725</b>	<b>124,011</b>	<b>-</b>	<b>\$ 252,390</b>
Comm Dev Non-City Improvements	135,540	-	-	-	-	\$ 135,540
Comm Dev Administration	48,625	-	-	-	-	\$ 48,625
<b>TIF # 6</b>	<b>184,165</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$ 184,165</b>
<b>Total - Southpoint Commerce Park Capital Projects</b>	<b>\$ 209,165</b>	<b>\$ 73,654</b>	<b>\$ 29,725</b>	<b>\$ 124,011</b>	<b>\$ -</b>	<b>\$ 436,555</b>

## COST ANALYSIS

### Estimated Cash Flows

Components	2017	2018	2019	2020	2021	Total
Planning	-	-	-	-	-	\$ -
Land Acquisition	-	-	-	-	-	\$ -
Construction	135,540	-	-	-	-	\$ 135,540
Other	73,625	73,654	29,725	124,011	-	\$ 301,015
<b>Total</b>	<b>\$ 209,165</b>	<b>\$ 73,654</b>	<b>\$ 29,725</b>	<b>\$ 124,011</b>	<b>\$ -</b>	<b>\$ 436,555</b>
Operating Cost Impact	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -





Huntley Elementary School Newsletter

# Huntley Happenings

10/7/2016

Huntley Office

832-6255

Huntley Attendance

832-6256

Visit us on the web at

<http://www.aasd.k12.wi.us/Huntley>

[Huntley Elementary is now on Facebook- "LIKE" Huntley to stay up to date](#)

Huntley Happenings is  
published 1st Friday of every month

**\*\*Principal Message can be found on page 2\*\***

## Huntley Wellness Walk & Talk

Please join us at our first annual Huntley Wellness Walk & Talk event. This is a combination of the Family Glow Walk and additional Break-Out Sessions that include: Making a Healthy Snack, Internet Safety, and the School Academic Plan. This is a fun-filled event for the whole family! Daycare will be provided during the Break-Out Sessions. This event is planned for the evening of Friday, November 11<sup>th</sup> from 6:00-8:00. Registration will begin at 5:45. Please look for a flier with more information on our school website and in your child's blue mailgram within the next few weeks. We hope to see you there!

## ARAMARK HIRING

Aramark has open positions, both full-time and part-time. This is a great opportunity to earn some extra money while working only on the days that your kids are at school.

Please visit [www.aramark.com/career](http://www.aramark.com/career) to apply.

### *Mission Statement*

*The Huntley Community believes that all children can learn.*

*We are dedicated to providing a positive and challenging*

*Environment that inspires student success.*

Happy Fall,

October is here and we have enjoyed our first month of school together. Our first month has consisted of establishing our school routines and expectations, developing relationships, and assessing students' knowledge to help ensure a successful school year. As you read your child's classroom newsletter, you will notice that many learnings and activities have already taken place within this first month of school.

With field trips happening at all grade levels and students riding the bus to and from school, it is important that our students know what is expected of them on the bus. Your child's teacher has reviewed these expectations with students during the first week at school. We ask that you also review these expectations with your child to provide consistency and remind them of expected behaviors. We appreciate your collaborative efforts in helping to ensure that all of our students are safe.

Parking and traffic around school can sometime be frustrating, but please help us ensure our students safety. Traffic and parking rules around schools are created and enforced for the safety of the students. Please follow all posted signs. A suggestion to avoid traffic congestion is to park further away from school and let your child cross the street at a crossing guard, safety patrol, marked or unmarked crosswalk. **Never** let your child cross between parked cars or mid-block! The school parking lot is NOT a drop-off zone; this is due to the fact that we have many students crossing in front of the lot on the sidewalk and reducing the traffic in/out allows for safe walking of our students.

A friendly reminder that supervision for students begins at 8:10 a.m. (7:50 a.m. if coming in for breakfast) and after school until 3:30 p.m. on our playground, blacktop, and in front of the school. School attendance and timeliness in arriving at school are critical factors for school success. Teaching children proper attendance patterns early in life gives them the tools to be successful throughout their education and into their adult life.

Please be reminded of the following:

- The school bell rings at 8:22. Students **should be in their classrooms** before the 8:27 bell.
- Parents/guardians can excuse students up to 10 days (full/partial/tardy); beyond the 10 days, documentation is needed to remain an excused absence.
  - Note that it is the parent or guardian's responsibility to report a student's absence to the school and state the reason for the absence **by 9:00 a.m.** If the child is not reported to the building, the student's absence will be considered "unexcused."
  - If your child is late or tardy it is the responsibility of the parent or guardian to **bring the child into the office** and sign him/her in before going to the classroom. This will ensure that your child enters the building safely and that our attendance records are accurate.

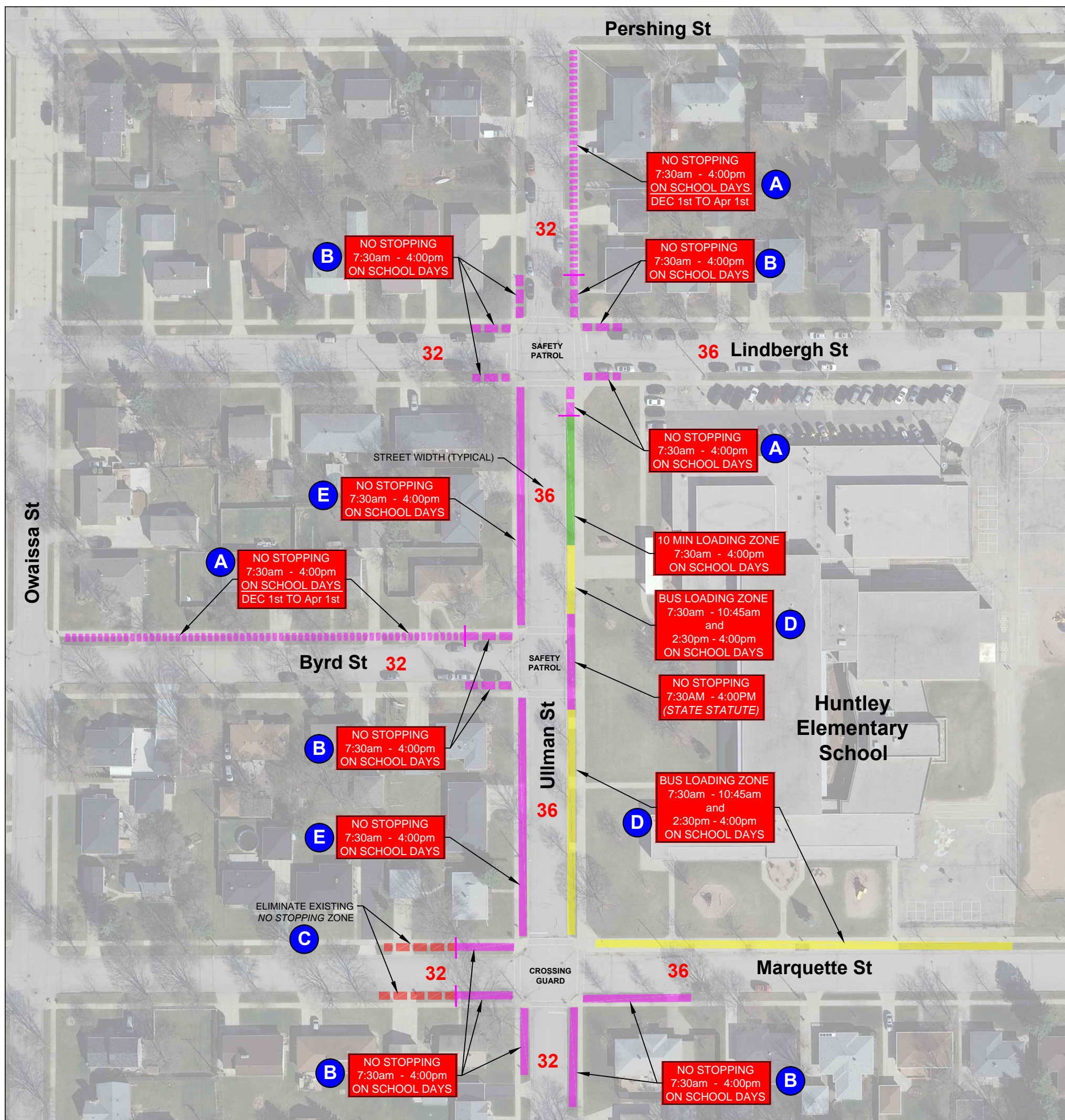
Lastly, THANK YOU for entrusting the education and safety of your children to the staff at Huntley Elementary School. Know that we are here to ensure your children receive a great education and we welcome you in this collaborative partnership.

Respectfully,



MaiKou Heu  
Associate Principal





## Transportation Expectations

	Seat /Aisle	Enter Behavior	Transfer	Exit Behavior
<b>Responsible</b>	<p>Report unsafe behavior to driver and/or parapro</p> <p>Ride assigned bus</p> <p>Illegal activities will not be tolerated</p>	<p>Ride assigned bus/get approval for any changes</p> <p>Illegal activities will not be tolerated</p>	<p>Illegal activities will not be tolerated</p> <p>Take all belongings with you</p>	<p>Illegal activities will not be tolerated</p> <p>Take all belongings with you</p>
<b>Respectful</b>	<p>Use kind words and quiet voices</p> <p>Follow posted bus rules</p> <p>Follow directions of driver and/or parapro</p> <p>Food or drink will not be consumed while riding the bus</p>	<p>Use kind words and quiet voices</p> <p>Follow posted bus rules</p> <p>Follow directions of driver and/or parapro</p>	<p>Use kind words and quiet voices</p> <p>Follow posted bus rules</p> <p>Follow directions of driver and/or parapro</p>	<p>Use kind words and quiet voices</p> <p>Follow posted bus rules</p> <p>Follow directions of driver and/or parapro</p>
<b>Safe</b>	<p>Keep hands, feet, body, and objects to yourself</p> <p>Sit and remain seated and use seat belt, if required</p> <p>Face forward at all times</p> <p>Illegal activities will not be tolerated</p> <p>Food or drink will not be consumed while riding the bus</p>	<p>Keep hands, feet, body, and objects to yourself</p> <p>Put away any food or drink while riding the bus</p> <p>Face forward at all times</p> <p>Illegal activities will not be tolerated</p>	<p>Keep hands, feet, body, and objects to yourself</p> <p>Wait for the bus to stop before exiting seat</p> <p>Illegal activities will not be tolerated</p>	<p>Keep hands, feet, body, and objects to yourself</p> <p>Wait for the bus to stop before exiting seat</p> <p>Illegal activities will not be tolerated</p>





## HUNTLEY COMMUNITY FITNESS PLAYGROUND



Huntley's fitness playground helps promote healthy lifestyles. There are two sides. One for students and the other for parents/adults. State law prohibits cross age usage and specifies age groups for each piece of equipment. ***We would like to invite you and your family to come and enjoy this new equipment during non-school hours.***

### THANK YOU TO THE FOLLOWING DONERS:

- City of Appleton
- Huntley PTO

*Thank You!*





# Appleton Area School District

122 E. College Ave., Suite 1A • P.O. Box 2019 • Appleton, WI 54912-2019

The Appleton Area School District will be continuing monthly Late Start Instructional Collaboration Days again this school year. The purpose of this additional monthly collaboration time is to allow teams of teachers to meet together regularly to review student progress and to plan more effectively for instruction. Professional collaboration is at the heart of the District's Continuous School Improvement Planning (CSIP) process.

The two hour late starts will occur on the **second Wednesday of each month.** The school day will begin **exactly two hours later than the regularly scheduled start time.** The dates are listed below and have been added to the Appleton Area School District Calendar for 2016-17 on the AASD website.

## **Late Start Dates:**

September 14, 2016

October 12, 2016

November 9, 2016

December 14, 2016

January 11, 2017

February 8, 2017

March 8, 2017

April 12, 2017

May 10, 2017

## **Registration Deadlines:**

September 9, 2016

October 7, 2016

November 4, 2016

December 9, 2016

January 6, 2017

February 3, 2017

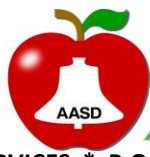
March 3, 2017

April 7, 2017

May 5, 2017

**Late Start forms can be found on the AASD website at:**  
**<http://www.aasd.k12.wi.us/parents/before>   [after school](http://www.aasd.k12.wi.us/parents/after)**





## **FROM THE SCHOOL NURSE**

### **Influenza: What you need to know**

Influenza (also called flu) is a contagious respiratory illness caused by influenza viruses. Flu viruses are spread in respiratory droplets caused by coughing and sneezing. They usually spread from person to person, though sometimes people become infected by touching something with flu viruses on it and then touching their mouth or nose.



#### **Symptoms of flu include:**

- Fever
- Headache
- Extreme tiredness
- Dry cough
- Sore throat
- Runny or stuffy nose
- Muscle aches

The best way to prevent the flu is to be immunized against the flu. The CDC (Center for Disease Control) recommends Influenza vaccination for children 6 months through 18 years of age. Vaccine is available as nasal spray or injection. Immunizations are available through physicians, public health, and at many local sites. Flu season can begin as early as October and last as late as May, so it is not too late to be immunized!

#### **Other ways to help stop the spread of flu viruses:**

- Wash hands often
- Stay home when you are sick
- Avoid close contact with people who are sick
- Cover your mouth and nose when coughing or sneezing
- Avoid touching your eyes, nose, and mouth

People need to get plenty of sleep and physical activity, drink water and eat good food to help them stay healthy in the winter and all year. Be proactive in protecting your health! Discuss the flu vaccine with your health care provider to determine if it is right for you and your family. For more information, please go to <http://www.flu.gov/#> or contact your healthcare provider.

HS-029a  
Rev 02/2015

## **Reminders from the School Nurse**

Debbie Olson, RN

### **COUGH DROPS / THROAT LOZENGES**

With cold and cough season fast approaching, we are asking parents to refrain from sending cough or throat lozenges to school. These small, slippery, hard, discs can become a choking hazard for children. For the safety of our students, we ask that these items not be brought to school or kept in the office for student use. Instead, please send your child to school with a water bottle if he/she is experiencing a cough or scratchy throat. Frequent sips from a water bottle will keep the throat moist and greatly soothe a scratchy throat and calm a cough. Thank you for your understanding and cooperation.

Please feel free to contact me at 920.419.7302 or [olsondeborah@asds.k12.wi.us](mailto:olsondeborah@asds.k12.wi.us) if you have any questions. Thank you!

# Counselor's Corner

## Guidance Lessons

Large group lessons this month will continue to focus on social and communication skills. However, grades 4 and 5 will focus on academic success.

### **Kindergarten**

- Continue to work on not interrupting and listening; direction following
- Learning about expected behavior and social smarts

### **1st grade**

- Following directions
- Always trying their



best even when its hard

### **2nd grade**

- Learn about how difficult it is to take back words and actions
- Practice working cooperatively

### **3rd grade**

- Discuss ways to be a friend
- Discuss difference between teasing & bullying

### **4th grade**

- Discuss strategies for optimal performance on standardized & other tests
- Discuss steps to be successful with homework

### **5th grade**

- Learn about different communication styles; look at own strongest style

### **6th grade**

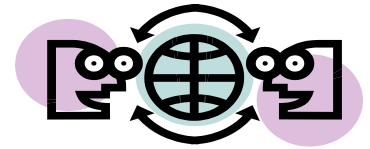
- Discuss "labeling" others
- Using different communication skills

Volume 2

October 2016

## Parent/Teacher Conferences

I will be available all nights of parent teacher conferences. If there is something that you want to discuss with me during conferences, please feel free to stop by and see me!



Conferences allow you to...

- Be involved
- Support your child
- Support your school
- Understand learning standards
- Know how your child is doing and what you can do to help
- Get answers to your questions



## Tips For Hassle Free Mornings

Here are some quick tips to teach children responsibility, as young as three or four years of age:

- Follow a visual list of tasks to complete; older students can use words
- Practice when you're not stressed
- Rise a bit early and get yourself ready first
- Get things ready the night before so as many things are set when you get up: backpack packed, clothes out, etc.
- Set a small number of limits; resist urge to nag or remind— follow with consequences

## How to Contact the School Counselor

**Brenda Weitermann**  
Huntley Elementary School  
2224 N. Ullman Street  
Appleton, WI 54911  
weitermannbren@aasd.k12.wi.us  
997-1399 ext. 3806

## ATTENTION PARENTS: Tutoring Available

There is a remarkable opportunity for students who may be struggling with their classes or who seek extra attention while doing homework. The Appleton YMCA is offering tutoring services to students in grades K-12. The program runs from 4-8pm Mondays through Thursdays at the YMCA, beginning the second week in October. Tutoring will be offered in a wide variety of subjects and depending on tutor availability and students needs. Lawrence stu-



dents will be serving as tutors which presents a great opportunity for high quality tutoring at no charge. There is a \$30 registration fee per student or \$60 per family, with financial assistance if necessary.

Please contact **Kourtney Kositzke**, at the YMCA.  
kkositzke@ymcafoxcities.org or 920-954-7602

Regular time and place to do homework helps.





Students have been singing, dancing, listening, and learning to read music this month during music classes. Ask your child about Music Street or Alabama Gal! Or about the songs they learned during 5<sup>th</sup> grade camp or the round, “Fish and Chips and Vinegar”. Maybe they can teach them to you.

Instruments have arrived! The halls are filled with the sounds of beginners tuning up, adjusting their bow holds, and finding their embouchures. It is exciting to see how many Huntley students are expanding their knowledge through the study of instruments. 2nd and 3<sup>rd</sup> year string students have been busy reviewing note reading and instrument technique.

DATE	DAY	EVENT	TIME	WARM-UP AREA	PERFORMANCE LOCATION
17 November 2016	Thursday	1, 2, 3 CONCERT	6:00-7:30 p.m.	Old Gym	MPR
13 January 2017	Friday	K CONCERT	2:45-3:16 p.m.	n/a	Auditorium
9 February 2017	Thursday	CULTURAL CONNECTIONS	4:30-6:30 p.m.	Art Room/107	MPR
9 March 2017	Thursday	4, 5, 6 CONCERT	6:00-7:30 p.m.	Old Gym	MPR
18 April 2017	Tuesday	Strings, Band, AND Intermediate Art Show	5:00-6:00 p.m. Art Show  6:00-7:00 p.m. Strings/Band	Room 107, Gym	MPR
24 April 2017	Monday	All City String Concert	7:00 p.m.	Fox Cities PAC	

# Roadrunner Walk Run Club At-Home Exercise Log

## October 1, 2016

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3 Walk and Bike to School Week	4	5	6	7 Walk at School Event 7:45am	8
9	10	11 FUTP 60 meeting	12 Late Start	13	14 Golf Trip 5 <sup>th</sup> AM 6 <sup>th</sup> PM	15
16	17	18 FUTP 60 Milk Mustache Booth at Conferences	19 Rain Date – Golf Trip	20	21	22
23/30	24/31	25	26	27 No School	28 No School	29

### At Home Exercise Rules

1. Record the number of minutes of exercise you do outside of the school day that makes your heart beat fast and that gets you hot and sweaty.
2. For every 15 minutes you exercise, Mrs. R. will give you 1 punch on your walk/run punch card at school.
3. Please send all completed logs to **Mrs. Rushkofske**
4. Each punch card has 17 punches on it which equals 5 Miles.
5. This year's theme is "**The Huntley Physical Activity Marathon.**" For every 26.2 miles logged (or 6 cards) students will earn a medal.
6. When a student reaches the **100-mile marker**, they will receive a **medal** and can pick a prize.
7. Any student who reaches **200 miles** will receive a **Gold Shoe Trophy** at the end of the school year.
8. Students will get 10 punches on their walk/run card for any community fun run they participate in.

Name: \_\_\_\_\_ Total Number of minutes: \_\_\_\_\_

Parent Signature: \_\_\_\_\_



October 1, 2016

# Physical Education News

Mrs. Rushkofske [RUSHKOFKSKEJILL@asds.k12.wi.us](mailto:RUSHKOFKSKEJILL@asds.k12.wi.us) 997-1399 x3823  
Mrs. Kaphingst [KAPHINGSTMARGE@asds.k12.wi.us](mailto:KAPHINGSTMARGE@asds.k12.wi.us) 997-1399x3860

## What's going on in Physical Education?

During October we will be working on spatial awareness activities and locomotor skills for primary students. Please have your child work on skipping, galloping, sliding, hopping, leaping, and jumping at home. We will also begin working on hand-eye coordination skills such as tossing, throwing, and catching.

Intermediate students will be working on striking skills by participating in golfing activities. We will be golfing for the next few weeks and will end the unit with a culminating activity by taking a Field Trip to Irish Waters Golf Course with our 5<sup>th</sup> and 6<sup>th</sup> grade students on Oct. 14th. After golf we will begin working on hand-eye coordination and invasion game play skills.

## Notes and Reminders:

### Gym Shoes

Please be sure your child has a separate pair of shoes for Physical Education class that are to be kept at school. We have new floors and would like them to stay clean and safe. If you need a pair of shoes, please let one of us know.

### Medical Excuses

If your child needs to be out of Physical Education class for more than 2 days for any medical reason, please send a doctor's note. If your child is going to be out for a long length of time-- for let's say a broken leg-- please ask the doctor what your child can do. (Ex. Dribble a ball from a chair, etc.) It's hard for kids to sit and watch their peers having fun working on their skills. Most of our activities can be adapted so they are able to safely participate in class.

Morning Intramurals for Grades 4-6 are held from 7:30am 8:10am Monday - Friday. Please see Mrs. R. if you need a permission slip to join.



## Fuel Up to Play 60 –

- FUTP60 would like to remind you of the importance of a healthy diet that includes foods from the dairy group. Consuming dairy products provides health benefits – especially improved bone health. Foods in the Dairy Group provide nutrients that are vital for health and maintenance of your body. These nutrients include calcium, potassium, vitamin D, and protein. Be sure to get your milk mustache at our FUTP60 booth at conferences.

## Fitness Playground –

Students at Huntley have been engaging in active play on our new playground equipment at recess. The new equipment provides a great opportunity for our students to build muscular strength and endurance while having fun with their friends. As a reminder there is a section of the new playground equipment specifically designed for adults and can only be used during non-school hours. This new equipment allows anyone in the community to utilize it. Please come try it out for yourself while your child plays on the new playground!



# Rolling With Reading

October 26<sup>th</sup>, 2016  
8:10 AM – 10:00 AM  
Huntley Auditorium



Dear Parents,

Reading is a life-long skill for everyone. Due to current research that shows how children learn best, the way reading was traditionally taught (and the way many of us have learned reading) has changed and rigorous reading standards are in place for all children in Wisconsin. We continue to teach the Common Core State Standards through our Reading Workshop. We would like to invite all parents to come and learn about the practices we are currently using to teach reading to your children.

**8:10 AM – Parents** - Welcome and Overview of morning in the Auditorium – Coffee, juice and pastries will be provided for parents.

**School-age children** may play on the playground or purchase breakfast as usual. *In order for lessons to stay focused, please use childcare in the gym if you need to bring preschool aged children.*

**8:20 AM** – Karen Russell, District Literacy Coach, will talk about Reader's Workshop.

**8:45-9:30** – Visit your child's classroom for Reader's Workshop. **If you have more than one child at Huntley, we ask you to choose just one classroom to visit so that you see the full lesson.** If two adults are attending, each adult can visit a different classroom.

**9:30 – 10:00** – Q&A session and survey in the Auditorium with Karen Russell, District Literacy Coach. (optional session)

**We hope you are able to join us! Please RSVP to your child's teacher by  
Wednesday, October 19, 2016**

-----  
\_\_\_\_\_ Yes, we will attend! Parent Name(s) who will be attending \_\_\_\_\_

\_\_\_\_\_ Yes, we will be using childcare in gym # of children \_\_\_\_\_ ages \_\_\_\_\_

Name of teacher whose classroom you will be visiting. \_\_\_\_\_

\_\_\_\_\_ No, we are not able to attend





# Learning with Technology

## Keyboarding Skills with TypingClub

by **Brian Bartel**, Technology Integration Specialist



To help students succeed in meeting their keyboarding end-of-year proficiency expectations (part of our ELA curriculum), students have access Typing Club.

Typing Club is an engaging and interactive web-based tutorial that allows students to practice touch typing skills while showing the correct hand posture on every key as they type.

Students can sign in to [appleton.typingclub.com](https://appleton.typingclub.com) with their school username and password or with their Google account.

A screenshot of a web browser displaying the login page for TypingClub. The browser's address bar shows "https://appleton.typingclub.com". The page has a blue background. On the left, there is a cartoon character of a person with a black cap and a keyboard for a body, with the text "TypingClub" and "Appleton Area School District" below it. On the right, under a "Sign in:" heading with a lock icon, there are two buttons: "using your Google account >>" and "using your Office 365 account >>". Below these is a separator line with "or" in the middle. Then, there are two input fields labeled "Your username or email:" and "Your password:". At the bottom right, there is a "Sign in" button and a copyright notice: "© Copyright 2016 - Typing - Schools".



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## Don't Forget to Stop at the Book Fair!!

Did you know that purchases from our book fairs benefit *every* student at Huntley? Over the last year more than \$10,000 in books, furniture and classroom supplies have been purchased with dollars earned in our book fairs!! This is also a great time to stock up on books for the holidays.

The book fair will be open during afternoon recess hours, after school, and during conferences the following hours:

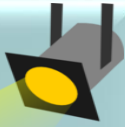
Tuesday, October 18	1:00 pm to 7:15
Wednesday, October 19	1:00 pm to 4:00
Thursday, October 20	1:00 pm to 6:30
Monday, October 24	1:00 pm to 6:30

The book fair is not possible without the help and generosity of our parents and volunteers. If you are interested in volunteering at the book fair, please contact Jennifer Chipman at [jenchipman0716@yahoo.com](mailto:jenchipman0716@yahoo.com).

Remember...when kids practice reading, they become better readers. And the better they get the more fun they'll have doing it!!

# HUNTLEY ELEMENTARY PTO NEWSLETTER

## OCTOBER SPOTLIGHT



**Badger Sports Park  
Family Fun Night  
Thursday, October 13<sup>th</sup>  
4:00 p.m. – 9:00 p.m.**

2 Hour Utopia - \$10 plus tax   3 Hour Utopia - \$12 plus tax  
Unlimited – Laser Tag, Mini Bowling, Inflatables, Go Karts,  
Mini Golf, Batting Cages, & all Non-Ticket Arcade Games.

Call ahead for laser tag reservations; outdoor activities are weather dependent. Play starts when cards are purchased, cards sold until 7:00 p.m. A portion of each card sold goes to Huntley! Have fun and support your school!

### October Calendar at a Glance

October 12 <sup>th</sup>	2 Hour Late Start
October 13 <sup>th</sup>	Badger Sports Park Family Night
October 20 <sup>th</sup>	Hansen's Fundraiser Pick Up
October 18, 20, 24 <sup>th</sup>	Parent Teacher Conferences
October 27 & 28 <sup>th</sup>	No School – Staff Development



*Please visit the Book Fair in the Huntley Auditorium during Parent Teacher Conferences. Book fair purchases help provide teachers with books and supplies for their classrooms!*

We were very happy to see so many parents at the September PTO meeting. The next meeting is on November 15, 2016, in the Library. We look forward to seeing you!

**If you have questions contact  
Heidi at [hmwidi@gmail.com](mailto:hmwidi@gmail.com)**



**Appleton Area School District**  
Preparing Our Students for Their Future



