

## **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		% Change *
Unit	Title	2014	2015	Adopted 2016	Amended 2016	
<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		new measure	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

	Actual 2014	Actual 2015	Target 2016	Projected 2016	Target 2017
<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