

CITY OF APPLETON 2018 BUDGET

COMMUNITY & ECONOMIC DEVELOPMENT

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CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

MISSION STATEMENT

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

DISCUSSION OF SIGNIFICANT 2017 EVENTS

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

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

CITY OF APPLETON 2018 BUDGET

COMMUNITY & ECONOMIC DEVELOPMENT

MAJOR 2018 OBJECTIVES

- * Implement the newly updated City's 2010-2030 Comprehensive Plan providing input to development proposals and initiating zoning code changes (when necessary and in compliance with state statutes) as identified in the Plan. Continue creation, execution and implementation of the City's Economic Development Strategic Plan, primary goals and key strategies that will result in the development within targeted districts of the City and enhance the business climate and vibrancy of the community.
- * Contact at least forty businesses in the City with information on business assistance programs and City support.
- * Attract development to the City that will result in substantial tax base enhancement; target remains 2.6% of new equalized value.
- * Sell four acres of business park land.
- * Continue multi-year process of a comprehensive re-write of the zoning ordinance and amendments to the official zoning map.
- * Coordinate and increase communication and shared vision between the technical review group, City departments, Plan Commission, Community and Economic Development Committee, Historic Preservation Commission, registered neighborhoods, Appleton Redevelopment Authority, Common Council and community.
- * Work with the development community, elected and appointed officials, neighborhoods, non-government organizations, businesses and other City departments to formulate development proposals that aligns with City plans, ordinances and policies, as well as recognized industry practices.
- * Continue to allow easier access to the City's GIS system by enhancing existing mobile applications, creating new applications, utilizing ArcGIS online as well as creating access for smartphones and tablets. Utilize upgraded server structure to better organize our external web applications and allow for more "real-time" updates to GIS data.
- * The Assessor's division will perform a City-wide revaluation of all commercial property including apartments in 2018. Revaluations are completed at least once every five years to maintain 100% fair market value assessments. Revaluing these 1,700 properties will require: inspecting properties, researching current listing and sale prices, analyzing assessment/sale price ratios, collecting and analyzing rental income data and income multipliers, applying appropriate replacement values and depreciation, defending the assessments, etc. It will be performed in-house using existing staff and resources.
- * Begin a Citywide revaluation of all 23,500 residential properties for 2019. By year-end 2018, we will have entered new land values, analyzed sales, completed the neighborhood ratio analysis, collected and analyzed rents, and set about 20% of the new improvement values. This large project was last performed in 2014 and will be completed in-house with no outside help or additional staff needed.

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Administration

Business Unit 10550

PROGRAM MISSION

For the benefit of staff so that productivity, efficiency, product quality, delivery of service and job satisfaction are optimized, we will provide a healthy work environment including proper supervision, training, evaluation, coaching and support services to better the quality of life in Appleton.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies # 1: "Prompt delivery of excellent services", # 2: "Encourage active community participation and involvement", # 3: "Recognize and grow everyone's talents," # 4: "Continually assess trends affecting the community and proactively respond", and # 6: "Create opportunities and learn from successes and failures."

Objectives:

Administrative processing, procedures and reporting for the department.

Continue to develop a standardized, coordinate-based and positionally accurate geographic information system (GIS) that meet the needs of all users.

Provide access to geographic and demographic information to City staff and, as appropriate, to the public.

Major changes in Revenue, Expenditures, or Programs:

The Community Development Specialist's salary and fringe benefit costs are recorded in both this budget and in the Housing and Community Development Grants budget. The portion of the Specialist's salary and fringes reimbursable through the grant is charged to the grant budget while the remainder is charged here. Due to a reduction in State grant funding, more of the position's salary and fringe benefit costs are reflected in this budget.

PERFORMANCE INDICATORS

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Administration

Business Unit 10550

PROGRAM BUDGET SUMMARY

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

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

None

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Marketing & Business Services

Business Unit 10551

PROGRAM MISSION

For the benefit of Appleton's current and prospective businesses and developers, so that business assistance services are identified and conveyed, and Appleton is selected as the prime location for investment, we will provide information and expertise to address business issues and promote the community. We are committed to fostering diversity through policies, processes, programs and educational opportunities that promote understanding and acceptance for all people while creating and supporting a culture of inclusion that celebrates and values our similarities and differences.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies # 2: "Encourage active community participation and involvement", # 3: "Recognize and grow everyone's talents", # 4: "Continually assess trends affecting the community and proactively respond," # 6: "Create opportunities and learn from successes and failures", and # 7: "Communicate our success through stories and testimonials."

Objectives:

- Continue to enhance the environment in Appleton to promote business and industry and attract investment.
- Continue to examine ways in which City government can be improved to be more responsive, supportive and proactive to business needs.
- Promote Appleton to the broader public, especially business and industry.
- Conduct business retention visits.
- Provide technical assistance for start-up and growing companies.
- Assist and be responsive to prospective and established businesses and developers.
- Promote the City's interest and develop positive relationships through active participation on various boards, committees and organizations.
- Continue implementation of the Comprehensive Plan 2010-2030 and Economic Development Strategic Plan.

Major changes in Revenue, Expenditures, or Programs:

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

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

PERFORMANCE INDICATORS

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

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

Marketing & Business Services

Business Unit 10551

PROGRAM BUDGET SUMMARY

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

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

Other Contracts/Obligations

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

New and Redevelopment Projects

Business Unit 10553

PROGRAM MISSION

For the benefit of targeted businesses and/or developers so that desired development occurs, we will prospect, encourage, direct, negotiate, coordinate and secure development projects.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategies # 2: "Encourage active community participation and involvement", # 4: "Continually assess trends affecting the community and proactively respond", and # 6: "Create opportunities and learn from successes and failures."

Objectives:

Provide quality information and direction, as well as financial and technical assistance to businesses seeking to expand or locate within the City.

Act as ombudsman for developers pursuing investments in the City.

Increase the commercial and industrial components' respective shares of the City's tax base, giving highest priority to redevelopment areas and tax incremental financing districts.

Create developable parcels throughout the City, especially within the City's industrial and business parks, redevelopment districts, tax incremental financing districts and registered neighborhoods.

Identify Brownfield sites within Appleton and when feasible and appropriate, mitigate those sites to bring them back to community use.

Plan and manage projects conducted to acquire land for industrial and business park expansion, provide necessary infrastructure to facilitate developments of raw land and secure the appropriate public approvals to allow development to occur.

Major changes in Revenue, Expenditures, or Programs:

No major program changes.

PERFORMANCE INDICATORS

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

New and Redevelopment Projects

Business Unit 10553

PROGRAM BUDGET SUMMARY

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

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

Consulting Services

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

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Planning

Business Unit 15020

PROGRAM MISSION

For the benefit of the entire community so that Appleton provides a balance between the community's growth needs and desires, thus ensuring an aesthetic and quality urban environment including those areas of historic value, we will provide planning, analysis, technical services and program/process coordination to assure citizen knowledge and interaction by complying with relevant codes, ordinances and regulations.

PROGRAM NARRATIVE

Link to Key Strategies:

Implements Key Strategies # 2: "Encourage active community participation and involvement", # 4: "Continually assess trends affecting the community and proactively respond," # 6: "Create opportunities and learn from successes and failures", and # 7: "Communicate our success through stories and testimonials."

Objectives:

- * Provide timely services to the public, development community and other agencies. Provide technical and administrative support to the Common Council, the Plan Commission, Community and Economic Development Committee and the Historic Preservation Commission in matters relating to the comprehensive plan, neighborhood program, zoning and subdivision ordinances, annexations, rezoning, special use permits, historic building and site designations, historic certificate awards, zoning text amendments, future streets, subdivisions, site plan appeals, business licenses and public land dedications and discontinuances.
- * Encourage the continued economic development of the City by working with developers, their representatives and the general public to facilitate and expedite their requests for development approval or general planning assistance.
- * Improve and protect the health, safety and welfare of Appleton citizens consistent with the Appleton subdivision ordinance, zoning ordinance, comprehensive plan and policies adopted by the Common Council with good land use planning and zoning practices.
- * Continue to maintain effective and efficient procedures for meeting legal requirements that set forth the maximum time periods in which planning and historic preservation applications must be accomplished.
- * Continue to coordinate the technical review group process.
- * Continue to monitor and maintain all elements of the comprehensive plan and all sections of the zoning ordinance and subdivision ordinance and process all suggested and required amendments to the comprehensive plan, zoning ordinance, subdivision ordinance and land use plan map, zoning map and official street map.
- * Continue to implement the goals, objectives and policies of the nine statutory elements of the comprehensive plan.
- * Provide the expertise and technical assistance in administering the City's neighborhood program including assisting residents in registering their neighborhood, marketing the program to City residents and working with Appleton residents, other City staff and outside agencies to leverage resources to help improve Appleton's neighborhoods.

Major changes in Revenue, Expenditures, or Programs:

No major program changes.

PERFORMANCE INDICATORS

	Actual 2015	Actual 2016	Target 2017	Projected 2017	Target 2018
Client Benefits/Impacts					
Timely, accurate processing of applications					
% of admin apps processed within the timeframe per ordinance	100%	100%	100%	100%	100%
% of commission apps processed within the timeframe per ordinance	100%	100%	100%	100%	100%
% of customers inquiries served within the timeframe per department policy	100%	100%	100%	100%	100%
% of complaints received on admin apps	0%	0%	2%	1%	0%
% of complaints received on commission applications	0%	0%	2%	1%	0%
Strategic Outcomes					
High-quality development that aligns with City plans, ordinances, and policies, as well as recognized industry best practices					
# of development projects guided through the review process, resulting in approval		15	20	22	20
# of comp plan goals and objectives implemented	9	6	10	12	10
Work Process Outputs					
Services performed					
# of admin applications approved	449	429	425	430	425
# of commission applications approved	53	34	25	30	25
# of customers inquiries served	1,374	1,043	900	975	900
# of comp plan and ordinance amendments adopted	6	3	2	4	2
# of historic sites, buildings, districts recognized/researched	2	5	2	3	2

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Planning

Business Unit 15020

PROGRAM BUDGET SUMMARY

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

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

None

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Assessing

Business Unit 13520

PROGRAM MISSION

The Appleton Assessor's Office, as a professional team, exists to maintain equitable market value assessments and serve as an informational resource to the community.

PROGRAM NARRATIVE

Link to City Goals:

Implements Key Strategy # 4: "Continuously assess trends affecting the community and proactively respond" and # 6: "Create opportunities and learn from successes and failures."

Objectives:

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

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

Major changes in Revenue, Expenditures, or Programs:

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

PERFORMANCE INDICATORS

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

CITY OF APPLETON 2018 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Assessing

Business Unit 13520

PROGRAM BUDGET SUMMARY

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

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

None

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