

## **CITY OF APPLETON 2019 BUDGET**

### **COMMUNITY & ECONOMIC DEVELOPMENT**

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# CITY OF APPLETON 2019 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 2018 EVENTS

In 2018, Community & Economic Development continued to deliver services with a focus on meeting the community needs & enhancing the quality of life.

- \* The Fox Cities Exhibition Center opened on January 11, 2018. We continue our collaboration with Inner Circle, the Red Lion Paper Valley Hotel and the Fox Cities Convention & Visitors Bureau. The final bond closing for the FCEC took place on May 1, 2018.
- \* Industrial development saw a continued increase in 2018 with the delivery of two new buildings in Southpoint Commerce Park. Custom Offsets opened their new 17,000 sq. ft. facility in February, and Security Luebke Roofing opened their new, approximately 20,000 sq. ft., facility in July. Becknell Industrial purchased 14.6 acres, also in Southpoint Commerce Park, in September, 2018. The City repurchased 4.32 acres in the Northeast Business Park from Farrell Investments, once again giving the City inventory in that area. The reason for the repurchase is Farrell Investments bought an existing building in Southpoint Commerce Park that they plan to make improvements and occupy in Spring, 2019.
- \* The grand opening of Eagle Point's new 99 unit senior living facility is expected in August, 2018. The Appleton Redevelopment Authority sold this redevelopment site, comprised of approximately 8.1 acres, in 2017 to Alexander Company and Tukka, the developers of Eagle Point. The development is expected to add \$21 million in value for Phase I. Phase II will be townhomes, and Phase III is in the planning stages with Alexander Company and Tukka Properties. RiverHeath is expected to break ground on the Willow, a 110 unit apartment building with commercial retail space. The Woolen Mills Loft, a \$10 million, 60 unit apartment complex constructed in the Flats, opened in April, 2018. This project used WHEDA tax credits and historic tax credits.
- \* Staff continued collaboration with US Venture to construct their headquarters on Bluff Site 1. Staff also continued to work with Milwaukee View on their redevelopment of the historic Zuelke Building. The proposals received for the proposed mixed-use library were reviewed and presented; the Common Council approved further discussion with the Commercial Horizon's team.
- \* Staff teamed up with Appleton Downtown Inc. to present the State of the Downtown Summit on May 15, 2018 that offered a downtown development opportunity Tour, updates on current downtown development, and informative panel presentations.
- \* 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.
- \* Implementation of the Comprehensive Plan continued in 2018, with highlights that include an amendment to Central Business District zoning to allow ground floor residential and creation of an Art in Public Places Policy/Committee.
- \* Planning staff collaborated with the City Attorney's Office and Inspections Division staff to repeal and create a new sign ordinance, which is another implementation strategy from the Comprehensive Plan. The Sign Ordinance amendments were in response to Supreme Court Ruling Reed v. Town of Gilbert Arizona, 135 S. Ct. 2218 (2015), the adoption and implementation of the Appleton Comprehensive Plan 2010-2030, and the array of sign types and technology available today. The Common Council adopted the new sign ordinance on April 4, 2018, and it went into effect on April 10, 2018.
- \* Staff worked intently with the developer, Appleton Storage I, LLC, to bring development to the former Kmart site at 2400 W. College Avenue which has been vacant for over a decade. The special use development agreement was approved by Council on June 20, 2018.
- \* To promote historic preservation, the Historic Preservation Commission created bookmarks of 4 existing historic buildings along College Avenue. They wrote a historic narrative explaining the historic significance and took photographs. We contracted with a professional printer to produce the bookmarks.
- \* Assessor's staff completed a Citywide revaluation of all 1,700 commercial properties. Values were increased by an average 5.5%, led by apartments at 15%. This project required many property inspections to update records, good public relations, detailed sales and income analysis, and accurate appraisal methodology. The changes reflected market value increases over the last five years and re-established tax equity among various commercial sectors.
- \* The City's equalized value increased by 4.2% in 2018 from \$5,222,923,900 to \$5,443,435,200 just short of the statewide gain of 4.5%.
- \* Business enhancement grants from TIF's 11 and 12 were fully utilized in 2018 with \$21,000 in TIF funding for each District. These funds leveraged another \$72,472 in private investment. Due to high demand, a waiting list was created for businesses that applied for the grants after funding was depleted.
- \* During the first half of 2018, the site plan review team has approved approximately 110 multi-family dwelling units, 37,200 square feet of office space, 34,500 square feet of commercial space, and 40,200 square feet of institutional space.
- \* Staff facilitated and approved the Viaene, North Edgewood Estates, and Leona Pond annexations, resulting in roughly 84.4 acres of land being annexed.
- \* The City had approximately 186 single family residential lots platted and available for sale starting in 2018. Final plat approval resulted in the creation of an additional 52 residential lots, including Emerald Valley IV and V and Trail View Estates. 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 second half of 2018. All of the GIS servers were migrated to a new SAN environment set up by IT. Along with the server migration, the GIS software was upgraded to the latest version. This new version had significant architecture changes compared to the previous system; all servers and software installs were upgraded.
- \* The GIS team continues to expand and implement the use of GIS tools for field use. Three additional departments now have applications allowing them to collect data in the field, and the GIS team continues to develop more applications for current users.

## CITY OF APPLETON 2019 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

### MAJOR 2019 OBJECTIVES

- \* Implement the City's updated 2010-2030 Comprehensive Plan providing input to development proposals and initiating zoning code changes (when necessary and in compliance with State Statutes) as identified in the Plan. Continue creation, execution and implementation of the City's Economic Development Strategic Plan, primary goals and key strategies that will result in development within targeted districts of the City and enhance the business climate and vibrancy of the community.
- \* Contact at least forty businesses in the City with information on business assistance programs and City support.
- \* Attract development to the City that will result in substantial tax base enhancement; target 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 the community.
- \* Work with the development community, elected and appointed officials, neighborhoods, non-government organizations, businesses and other City departments to formulate development proposals that align with City plans, ordinances and policies, as well as recognized industry practices.
- \* Continue to allow easier access to the City's GIS system by enhancing existing mobile applications, creating new applications, utilizing ArcGIS online as well as creating access for smartphones and tablets. Utilize upgraded server/software structure to better organize our external web applications and allow for more "real-time" updates to GIS data.
- \* Complete a City-wide revaluation of all residential property. We perform revaluations at least once every five years to maintain 100% fair market values. Residential revaluations are time consuming, requiring substantial statistical analysis, computerized modeling, collection of rental data, significant data entry, and individual appraisal review of all 23,000 homes. However, revaluing frequently is necessary to re-establish equity for tax fairness, resulting in smaller value changes and fewer appeals. This large project will be performed in-house with limited overtime.

### DEPARTMENT BUDGET SUMMARY

Programs		Actual		Budget		% Change *
Unit	Title	2016	2017	Adopted 2018	Amended 2018	
<b>Program Revenues</b>		\$ 17,310	\$ 20,870	\$ 18,800	\$ 18,800	\$ 18,350 -2.39%
<b>Program Expenses</b>						
10550	Administration	527,332	525,860	554,582	554,582	575,958 3.85%
10551	Marketing	216,086	173,459	163,664	163,664	141,658 -13.45%
10553	New & Redevelopment	195,468	182,186	208,114	208,114	212,456 2.09%
15020	Planning	271,934	273,584	280,414	280,414	282,978 0.91%
13520	Assessing	542,794	566,540	558,402	558,402	578,599 3.62%
<b>TOTAL</b>		\$ 1,753,614	\$ 1,721,629	\$ 1,765,176	\$ 1,765,176	1,791,649 1.50%
<b>Expenses Comprised Of:</b>						
Personnel		1,601,832	1,582,063	1,613,599	1,613,599	1,662,680 3.04%
Administrative Expense		22,390	29,699	25,330	25,330	26,064 2.90%
Supplies & Materials		11,255	15,981	13,475	13,475	15,225 12.99%
Purchased Services		109,108	85,765	104,000	104,000	79,233 -23.81%
Utilities		4,012	4,179	4,212	4,212	4,212 0.00%
Repair & Maintenance		5,017	3,942	4,560	4,560	4,235 -7.13%
Capital Expenditures		-	-	-	-	- N/A
<b>Full Time Equivalent Staff:</b>						
Personnel allocated to programs		18.13	16.81	16.87	16.87	16.97

# CITY OF APPLETON 2019 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 meets the needs of all users.

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

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

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

Printing costs include all copies made by City Departments on the 5th floor color copier machine in Community and Economic Development. Usage continues to increase.

## PERFORMANCE INDICATORS

	<u>Actual 2016</u>	<u>Actual 2017</u>	<u>Target 2018</u>	<u>Projected 2018</u>	<u>Target 2019</u>
<b>Client Benefits/Impacts</b>					
Employee retention					
% staff turnover	5%	6%	0%	0%	0%
Accurate and useful information					
# of layers edited (GIS)	1,403	1,080	700	850	800
Improve business and work flow					
# of users supported on GIS software	137	231	130	130	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	379	471	250	300	250

# CITY OF APPLETON 2019 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**Administration**

**Business Unit 10550**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2016	2017	Adopted 2018	Amended 2018	2019
Revenues					
4801 Charges for Serv. - Nontax	\$ 880	\$ 3,445	\$ 800	\$ 800	\$ 350
5020 Donations & Memorials	-	-	-	-	-
Total Revenue	<u>\$ 880</u>	<u>\$ 3,445</u>	<u>\$ 800</u>	<u>\$ 800</u>	<u>\$ 350</u>
Expenses					
6101 Regular Salaries	\$ 350,643	\$ 334,064	\$ 365,273	\$ 365,273	\$ 374,617
6105 Overtime	409	1,088	-	-	-
6150 Fringes	143,777	145,153	151,332	151,332	161,247
6201 Training\Conferences	6,753	12,928	8,000	8,000	8,240
6206 Parking Permits	7,412	7,350	7,260	7,260	7,260
6301 Office Supplies	1,608	2,287	2,200	2,200	2,244
6302 Subscriptions	348	400	500	500	500
6303 Memberships & Licenses	2,180	2,310	3,200	3,200	3,200
6305 Awards & Recognition	270	256	270	270	270
6307 Food & Provisions	527	409	400	400	450
6315 Books & Library Materials	-	143	75	75	75
6320 Printing & Reproduction	9,903	13,705	11,800	11,800	13,550
6327 Miscellaneous Equipment	-	158	200	200	200
6412 Advertising	930	2,871	1,300	1,300	1,333
6413 Utilities	2,572	2,738	2,772	2,772	2,772
Total Expense	<u>\$ 527,332</u>	<u>\$ 525,860</u>	<u>\$ 554,582</u>	<u>\$ 554,582</u>	<u>\$ 575,958</u>

## DETAILED SUMMARY OF 2019 PROPOSED EXPENDITURES > \$15,000

None

# CITY OF APPLETON 2019 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:

Funding for the Fox Cities Regional Partnership has not been included in the 2019 budget for this program.

### PERFORMANCE INDICATORS

	<u>Actual 2016</u>	<u>Actual 2017</u>	<u>Target 2018</u>	<u>Projected 2018</u>	<u>Target 2019</u>
<b>Client Benefits/Impacts</b>					
Connection to source of issue resolution or resource					
# Existing businesses assisted	35	63	40	45	40
# Start-up businesses assisted	11	12	35	30	35
Information specific to development in Appleton					
# of prospects information deliveries	31	37	70	40	70
<b>Strategic Outcomes</b>					
Appleton's economy grows and tax base enhanced					
% increase in total equalized value	2.06%	5.80%	2.60%	2.60%	2.60%
<b>Work Process Outputs</b>					
Retention visit clients served					
# Business retention visits/follow-ups	38	47	40	40	40

**CITY OF APPLETON 2019 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Marketing & Business Services**

**Business Unit 10551**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		
	2016	2017	Adopted 2018	Amended 2018	2019
Expenses					
6101 Regular Salaries	\$ 102,310	\$ 76,759	\$ 76,691	\$ 76,691	\$ 78,503
6150 Fringes	39,216	27,553	25,973	25,973	27,155
6303 Membership & Licenses	701	-	-	-	-
6431 Interpreter Services	508	75	-	-	-
6599 Other Contracts/Obligations	73,351	69,072	61,000	61,000	36,000
Total Expense	<u>\$ 216,086</u>	<u>\$ 173,459</u>	<u>\$ 163,664</u>	<u>\$ 163,664</u>	<u>\$ 141,658</u>

**DETAILED SUMMARY OF 2019 PROPOSED EXPENDITURES > \$15,000**

Other Contracts/Obligations

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

# CITY OF APPLETON 2019 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 changes.

### PERFORMANCE INDICATORS

	Actual 2016	Actual 2017	Target 2018	Projected 2018	Target 2019
<b>Client Benefits/Impacts</b>					
Guidance rec'd to success in dev. in Appleton					
# projects consulted	16	31	20	25	20
Assist in land assembly, development incentives, or project management					
# developments generated via direct management	1	3	5	3	5
# of improved business park acres	100	100	100	90	90
<b>Strategic Outcomes</b>					
Tax base enhanced					
\$ increase industrial/commercial	\$ 25,082,437	\$ 55,297,580	\$ 14,000,000	\$ 20,000,000	\$ 14,000,000
\$ increase in target districts	\$ 20,377,086	\$ 24,717,932	\$ 4,000,000	\$ 4,000,000	\$ 4,000,000
\$ business park permits	\$ 18,606,737	\$ 7,943,431	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
<b>Work Process Outputs</b>					
# of development agreements completed	0	2	3	3	2
# of acres sold in business park	9	6.64	4	14.60	4



# CITY OF APPLETON 2019 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

**New and Redevelopment Projects**

**Business Unit 10553**

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2016	2017	Adopted 2018	Amended 2018	2019
Expenses					
6101 Regular Salaries	\$ 128,442	\$ 131,334	\$ 131,423	\$ 131,423	\$ 133,698
6150 Fringes	44,326	48,783	46,691	46,691	48,758
6404 Consulting Services	22,700	2,069	30,000	30,000	30,000
Total Expense	<u>\$ 195,468</u>	<u>\$ 182,186</u>	<u>\$ 208,114</u>	<u>\$ 208,114</u>	<u>\$ 212,456</u>

## DETAILED SUMMARY OF 2019 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 2019 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 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:

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

## PERFORMANCE INDICATORS

	Actual 2016	Actual 2017	Target 2018	Projected 2018	Target 2019
<b>Client Benefits/Impacts</b>					
Timely, accurate processing of applications					
% of admin apps processed within the timeframe per ordinance	100%	100%	100%	100%	100%
% of commission apps processed within the timeframe per ordinance	100%	100%	100%	100%	100%
% of customers inquiries served within the timeframe per department policy	100%	100%	100%	100%	100%
% of complaints received on admin apps	0%	0%	0%	0%	0%
% of complaints received on commission applications	0%	0%	0%	0%	0%
<b>Strategic Outcomes</b>					
High-quality development that aligns with City plans, ordinances, and policies, as well as recognized industry best practices					
# of development projects guided through the review process, resulting in approval	15	17	20	25	20
# of comp plan goals and objectives implemented	6	50	10	50	40
<b>Work Process Outputs</b>					
Services performed					
# of admin applications approved	429	455	425	425	425
# of commission applications approved	34	47	25	30	25
# of customers inquiries served	1,043	1,312	900	1,200	900
# of comp plan and ordinance amendments adopted	3	3	2	2	2
# of historic sites, buildings, districts recognized/researched	5	0	2	150	2

# CITY OF APPLETON 2019 BUDGET COMMUNITY & ECONOMIC DEVELOPMENT

Planning

Business Unit 15020

## PROGRAM BUDGET SUMMARY

Description	Actual		Budget		
	2016	2017	Adopted 2018	Amended 2018	2019
Revenues					
5002 Zoning & Subdivision Fees	\$ 16,430	\$ 17,425	\$ 18,000	\$ 18,000	\$ 18,000
Total Revenue	<u>\$ 16,430</u>	<u>\$ 17,425</u>	<u>\$ 18,000</u>	<u>\$ 18,000</u>	<u>\$ 18,000</u>
Expenses					
6101 Regular Salaries	\$ 192,081	\$ 190,254	\$ 196,581	\$ 196,581	\$ 195,645
6150 Fringes	79,853	83,330	83,533	83,533	87,033
6305 Awards & Recognition	-	-	300	300	300
Total Expense	<u>\$ 271,934</u>	<u>\$ 273,584</u>	<u>\$ 280,414</u>	<u>\$ 280,414</u>	<u>\$ 282,978</u>

## DETAILED SUMMARY OF 2019 PROPOSED EXPENDITURES > \$15,000

None

# CITY OF APPLETON 2019 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 23,000 residential properties in 2019. Revaluations are performed at least once every five years to maintain 100% fair market value assessments. They are time consuming projects, requiring substantial statistical analysis, computerized modeling, collection of rental data, significant data entry, and individual appraisal review of all 23,000 homes. Home values have robustly trended upwards since 2014, but the appreciation rate varies by price range, physical condition, and other factors. Revaluing at least once every five years re-establishes the equity needed for tax fairness, resulting in smaller value changes and fewer appeals. This large project will be performed in-house with limited overtime.

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

Estimated overtime cost for the timely completion of the 2019 Citywide revaluation project is \$3,800 (actual overtime cost for the 2014 Citywide revaluation was \$3,513). This program also includes an increase in the Real Estate Technician position, to .7 FTE.

The increase in subscriptions is due to the cost of the MLS subscription to validate home sales as required by the WDOR and to find comparable sales for waterfront and large homes.

## PERFORMANCE INDICATORS

	Actual 2016	Actual 2017	Target 2018	Projected 2018	Target 2019
<b>Client Benefits/Impacts</b>					
Equitable assessments and equitable distribution of tax levy:					
Assessment districts within 10% of market value	98%	96%	94%	52%	100%
Coefficient of dispersion of assessment/sale ratios	9%	11%	12%	13%	8%
# assessment errors resulting in inaccurate taxes	1	2	0	3	0
<b>Strategic Outcomes</b>					
Assessments accurately reflect market values:					
Residential class level of assessment	98%	94%	100%	90%	100%
Commercial class level of assessment	101%	96%	100%	95%	100%
Overall level of assessment	99%	95%	100%	90%	100%
<b>Work Process Outputs</b>					
% of buildings inspected to update records:					
Commercial new construction	100%	100%	100%	100%	100%
Residential new construction	95%	95%	95%	87%	85%
Recent sales	51%	43%	40%	25%	25%
Total # of interior inspections	1,601	952	800	650	650
Property record maintenance:					
Deeds processed (ownership changes)	2,568	2,489	2,600	2,400	2,500
Lot splits, CSM's, & new platted parcels	134	160	100	175	200
Annexed parcel(s)	2	-	2	5	4
Assessments updated	895	1,019	1,600	1,613	20,000

**CITY OF APPLETON 2019 BUDGET  
COMMUNITY & ECONOMIC DEVELOPMENT**

**Assessing**

**Business Unit 13520**

**PROGRAM BUDGET SUMMARY**

Description	Actual		Budget		2019
	2016	2017	Adopted 2018	Amended 2018	
Expenses					
6101 Regular Salaries	\$ 377,193	\$ 386,093	\$ 383,918	\$ 383,918	\$ 395,487
6105 Overtime	-	1,300	3,500	3,500	3,800
6150 Fringes	143,581	156,354	148,684	148,684	156,737
6201 Training\Conferences	1,898	2,289	1,700	1,700	1,500
6302 Subscriptions	343	1,100	1,100	1,100	1,700
6303 Memberships & Licenses	350	370	400	400	400
6327 Miscellaneous Equipment	1,352	1,974	1,400	1,400	1,400
6413 Utilities	1,440	1,440	1,440	1,440	1,440
6425 CEA Equip. Rental	5,017	3,942	4,560	4,560	4,235
6599 Other Contracts/Obligations	11,620	11,678	11,700	11,700	11,900
Total Expense	<u>\$ 542,794</u>	<u>\$ 566,540</u>	<u>\$ 558,402</u>	<u>\$ 558,402</u>	<u>\$ 578,599</u>

**DETAILED SUMMARY OF 2019 PROPOSED EXPENDITURES > \$15,000**

None

City of Appleton  
2018 Budget  
Revenue and Expense Summary

Description	2016 Actual	2017 Actual	2018 YTD Actual	2018 Adopted Budget	2018 Amended Budget	2019 Requested Budget	2019 Adopted Budget
REVENUES							
Charges for Services	880	3,445	457	800	800	800-	350
Other Revenues	16,430	17,425	17,040	18,000	18,000	18,000-	18,000
TOTAL REVENUES	17,310	20,870	17,497	18,800	18,800	18,800-	18,350
EXPENSES BY LINE ITEM							
Regular Salaries	1,016,190	977,498	699,326	1,153,886	1,153,886	1,173,782	1,177,450
Labor Pool Allocations	18,407	18,655	11,829	0	0	0	0
Overtime	235	2,387	3,267	3,500	3,500	3,800	3,800
Other Compensation	375	500	500	0	0	500	500
Sick Pay	227	0	1,973	0	0	0	0
Vacation Pay	115,645	121,850	95,939	0	0	0	0
Fringes	450,753	461,173	309,669	456,213	456,213	485,559	480,930
Salaries & Fringe Benefits	1,601,832	1,582,063	1,122,503	1,613,599	1,613,599	1,663,641	1,662,680
Training & Conferences	8,651	15,217	5,227	9,700	9,700	9,740	9,740
Parking Permits	7,412	7,350	7,260	7,260	7,260	7,260	7,260
Office Supplies	1,608	2,287	965	2,200	2,200	2,244	2,244
Subscriptions	691	1,500	957	1,600	1,600	2,200	2,200
Memberships & Licenses	3,231	2,680	2,055	3,600	3,600	3,600	3,600
Awards & Recognition	270	256	0	570	570	570	570
Food & Provisions	527	409	201	400	400	450	450
Administrative Expense	22,390	29,699	16,665	25,330	25,330	26,064	26,064
Books & Library Materials	0	143	0	75	75	75	75
Printing & Reproduction	9,903	13,705	6,913	11,800	11,800	14,000	13,550
Miscellaneous Equipment	1,352	2,133	1,360	1,600	1,600	1,600	1,600
Supplies & Materials	11,255	15,981	8,273	13,475	13,475	15,675	15,225
Consulting Services	22,700	2,069	3,115	30,000	30,000	30,000	30,000
Advertising	930	2,871	777	1,300	1,300	1,333	1,333
Interpreter Services	508	75	0	0	0	0	0
Other Contracts/Obligations	84,970	80,750	54,926	72,700	72,700	83,900	47,900
Purchased Services	109,108	85,765	58,818	104,000	104,000	115,233	79,233
Telephone	1,051	1,603	550	1,332	1,332	1,332	1,332
Cellular Telephone	2,961	2,576	1,774	2,880	2,880	2,880	2,880
Utilities	4,012	4,179	2,324	4,212	4,212	4,212	4,212
CEA Equipment Rental	5,017	3,942	2,236	4,560	4,560	4,235	4,235
Repair & Maintenance	5,017	3,942	2,236	4,560	4,560	4,235	4,235
Capital Expenditures	0	0	0	0	0	0	0
TOTAL EXPENSES	1,753,614	1,721,629	1,210,819	1,765,176	1,765,176	1,829,060	1,791,649