



**CITY OF WAUWATOSA**  
**COMMITTEE OF THE WHOLE**  
**AGENDA • OCTOBER 22, 2013**

---

**Regular Meeting****Upper Civic Center****6:30 PM****7725 W. North Avenue, Wauwatosa, WI 53213**

---

PLEASE NOTE: The items on this agenda may be revised before the time of the Common Council meeting, some items may be removed and others added prior to the completion of the final Common Council agenda. The final agenda will be available in the City Clerk's office and on the city website at [www.wauwatosa.net](http://www.wauwatosa.net). It is anticipated that each item listed on the agenda may be discussed, referred or acted upon unless it is noted in the specific agenda item that no action is contemplated.

---

**COMMITTEE OF THE WHOLE ITEMS**

1. Strategic planning work session facilitated by Dave Unmacht, Springsted, Inc.

Any person who has a qualifying disability as defined by the Americans with Disabilities Act who requires the meeting or materials at the meeting to be in an accessible location or format, must contact the City Clerk at voice telephone 479-8917 or TTY 471-8484 (City Hall, 7725 W. North Avenue, Wauwatosa, Wisconsin 53213) for accommodations. Requests for accommodations for meetings should be made at least three (3) business days prior to the meeting. Every effort will be made to arrange accommodations for all meetings; so please give the City Clerk as much advance notice as possible.

CITY OF WAUWATOSA  
MEMO



To: **Committee of the Whole**

From: **Carla Ledesma**

Date: **November 01, 2013**

Subject: **Strategic planning work session facilitated by Dave Unmacht, Springsted, Inc.**

# City of Wauwatosa, Wisconsin Common Council Work Session

October 22, 2013

David Unmacht  
Springsted, Incorporated

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Work Session Agenda

- 6:30 p.m. Purpose: Mayor, Council President and City Admin.
- 6:45 p.m. Overview of the Process and Working Document
- 7:00 p.m. Setting the Stage – Strategic Planning: Facilitator
- 7:30 p.m. Present Demographic and Financial Trends
- 7:45 p.m. Discuss and Prioritize the Strengths and Challenges
- 8:15 p.m. Discuss the Planning Worksheets
- 9:30 p.m. Process and Next Steps – Adjourn

# A City with Momentum

Identify the most significant changes that have taken place in Wauwatosa within the past 12-18 months.

Identify the most significant changes you anticipate within the upcoming 12-18 months.

Identify the most significant changes you anticipate within the city and community in the next five years?

# Success in Local Government

- Plan for the future
  - Balance short and long term resources and priorities
- Defined roles and expectations
  - Duties and responsibilities are clear and understood
- Strive for efficiency and effectiveness
  - Focus on structures and business practices
- Share common values
  - Respect individual opinions, work to seek consensus

# Environmental Factors

- Dynamic society pressures
- The lingering effects of the recession
- Changing citizen expectations
- Constrained \$\$\$
- Changing demographics
- Collaborations and partnerships
- Generational influences
- Organizational changes
- Technology impact
- Competition for workers

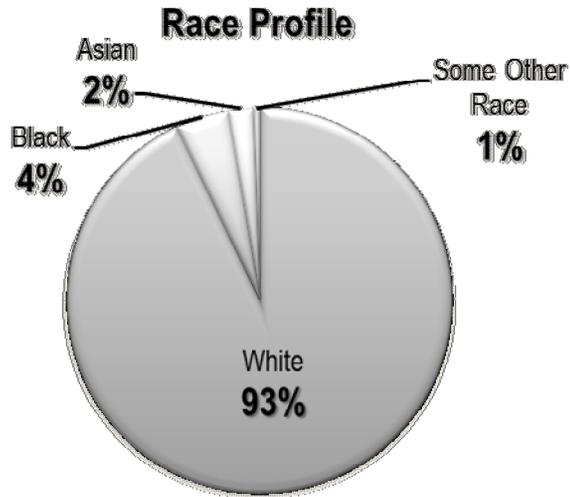
# Trends

- Lingering effects of recession yet optimistic outlook
- Demand for open and transparent government
- Technology is reshaping delivery system models
- Polarization of politics is now at the local level
- Lack of patience for historical cultures and practices
- Influence of social media; yet to be fully realized
- Retirements of long tenured experienced staff

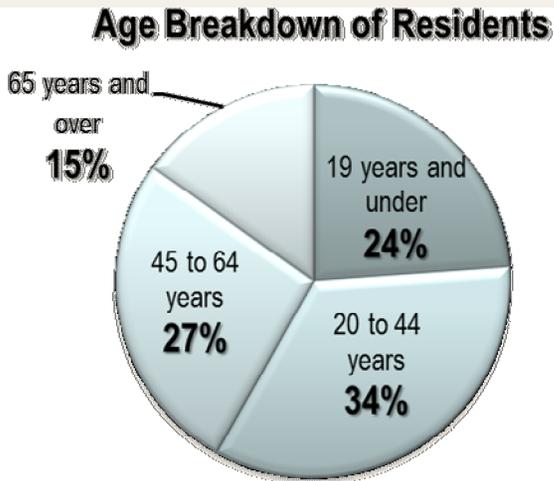
# Internal Factors that Shape Your Future

- Size of community
- Governance model
- Leadership styles
- Policy issues
- Trust levels
- Priorities and projects
- Elections

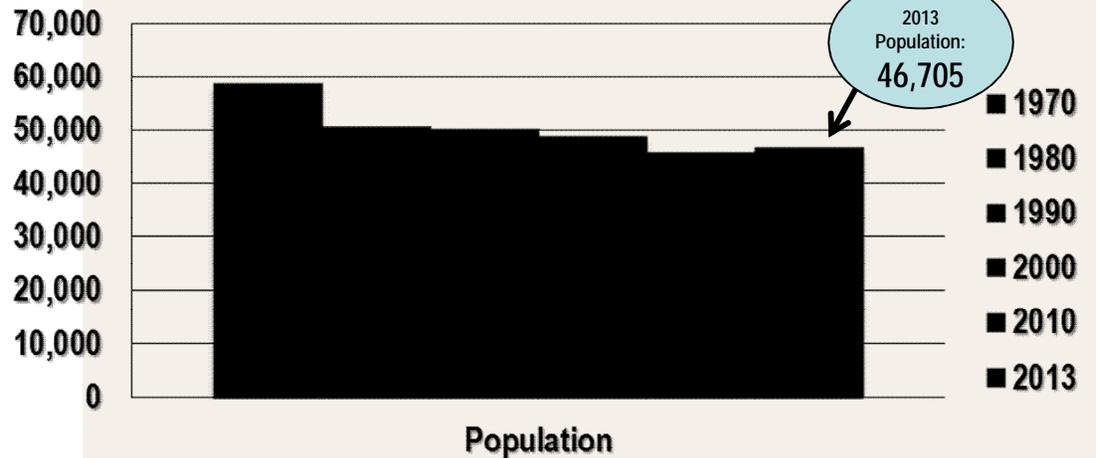
# Demographic Characteristics



<b>50%</b> increase in minority resident's since 2000.	<b>39.3</b> Average Age
<b>71,371</b> Estimated Daytime Population	<b>2.92</b> Average Household Size



### Wauwatosa Population: 1970-2010



Sources: (1) '00 US Census; (2) US Census ACS Five Year Estimates, '07-'11; (3) WisDOA Final Estimate of 1/1/13 Population; and (4) WisDOR "Towns, Villages and City Taxes"

Attachment: 102213COWpower point (1773 : Strategic Planning)

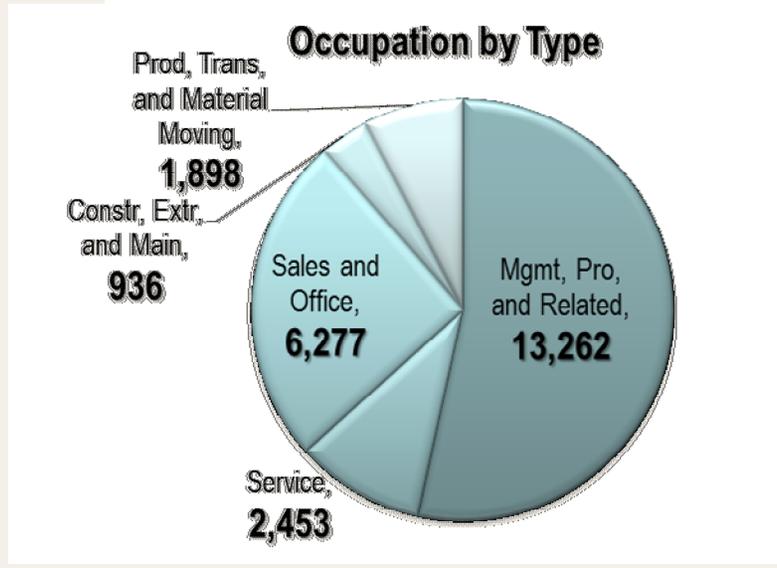
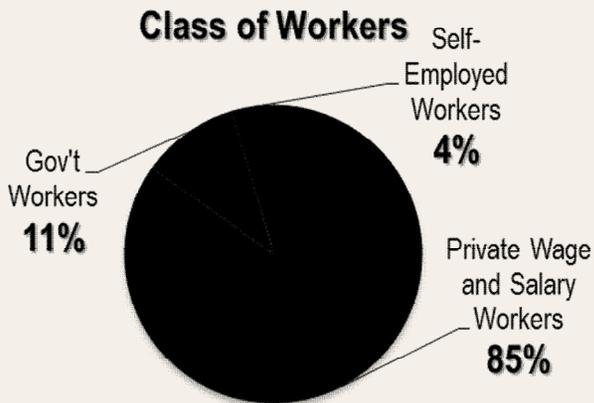
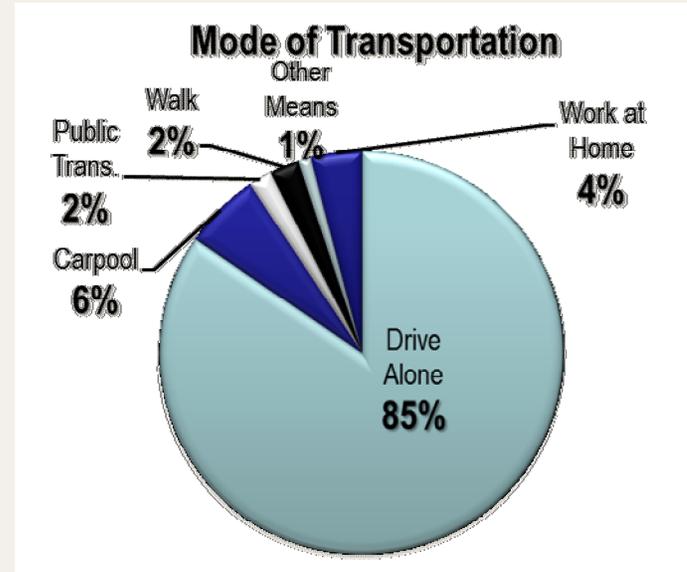
# Economic Characteristics

**19.3**  
Average Travel Time (Min.)

**2.5%**  
Estimated Unemployment Among Eligible Workers

**29.8%**  
Adult Age Residents Not in Labor Force

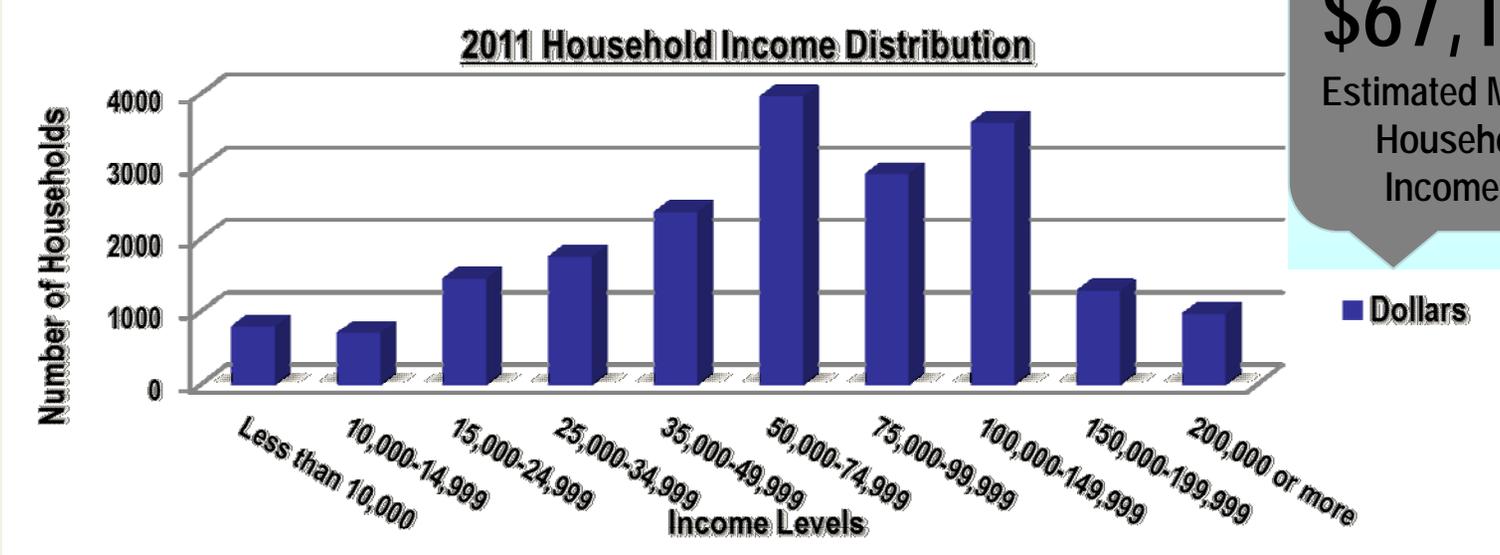
Employment Status	
Employed	25,798
Unemployed	972
Armed Forces	25



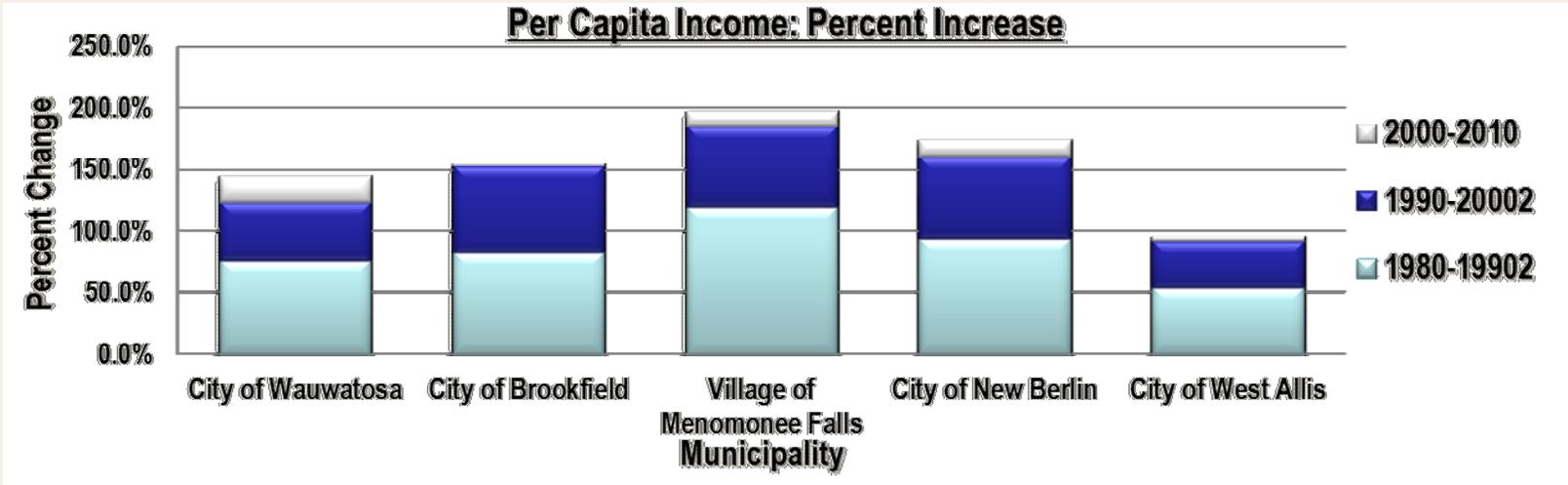
Sources: (1) US Census American Community Survey Five Year Estimates, 2007-2011

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Economic Characteristics, Cont.



**\$67,133**  
 Estimated Median Household Income (\$)



Sources: (1) US Census American Community Survey Five Year Estimates, 2007-2011; (2) '80 Taxes, Aid, and Shared Taxes in Wis Muni, WisDOR; (3) '90, '00, '10 Wis Muni Per Capita Income Report, WisDOR

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Tosa Aaa Credit Rating Comparison

	City of Wauwatosa	Moody's Wisconsin Aaa Medians	Difference
Total General Fund Revenues	\$46,002,090	\$53,653,000	(\$7,650,910)
General Fund Fund Balance as % of Revenues	41.4%	35.6%	5.8%
Unreserved General Fund Fund Balance as % of Revenues	34.4%	32.8%	1.6%
Total Equalized Value	\$4,963,918,700	\$5,243,280,000	(\$279,361,300)
Equalized Value Per Capita	\$106,990	\$113,050	(\$6,060)
Top 10 Taxpayers as % of Total	12.2%	5.9%	6.3%
Direct Debt as % of Equalized Value	1.2%	0.9%	0.3%
Direct Debt Per Capita	\$1,297.57	\$1,028.00	\$270
Overall Debt Burden as % of Equalized Value	3.1%	2.6%	0.5%
Overall Debt Per Capita	\$3,298.06	\$2,690.00	\$608
Debt Service Paid in 10 Years	93.3%	91.0%	2.3%
Population	46,396	46,396	0
Median Family Income as % of US	135.5%	135.9%	-0.4%

\* Data Sources – City 2012 CAFR, City 2013 OF, Moody's 2013 Rating Report, Moody's 2013 WI Medians

\*\* Items denoted in red are "negative" in relation to the Moody's Aaa WI medians

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Tosa Statistic Comparison to Competitors

	Wauwatosa	Brookfield	Franklin	Greenfield	Menomonee Falls	New Berlin	Waukesha	West Allis
2011 Population	46,380	37,890	35,404	36,672	35,675	39,594	70,735	60,365
Rank	3							
2011 Net Basic Spending Per Capita	\$788	\$727	\$534	\$611	\$558	\$558	\$562	\$739
Rank	1							
2011 Net Operating Spending Per Capita	\$1,351	\$999	\$756	\$750	\$969	\$693	\$833	\$1,079
Rank	1							
2011 GO Debt	\$52,957,900	\$49,990,000	\$32,495,000	\$32,827,000	\$87,735,000	\$39,591,200	\$116,335,000	\$78,518,300
Rank	4							
2011 GO Debt Per Capita	\$1,142	\$1,319	\$918	\$895	\$2,459	\$1,000	\$1,645	\$1,301
Rank	5							
2011 Property Tax Levy	\$36,555,100	\$35,308,000	\$20,467,000	\$21,409,300	\$21,709,500	\$23,997,100	\$51,466,900	\$38,728,700
Rank	3							
2011 Property Tax Rates	\$7.30	\$5.87	\$5.74	\$7.17	\$5.13	\$5.06	\$9.16	\$10.19
Rank	3							
2011 Shared Revenue	\$1,895,300	\$889,600	\$823,800	\$1,649,200	\$587,100	\$731,600	\$3,903,200	\$9,918,000
Rank	3							
2011 Income Taxes Per Return	\$66,020	\$98,420	\$67,240	\$43,780	\$65,860	\$66,580	\$58,440	\$37,710
Rank	4							

Source – Municipal Facts13

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Tosa Tax Base Comparison to Competitors

	Wauwatosa	Brookfield	Franklin	Greenfield	Menomonee Falls	New Berlin	Waukesha	West Allis
2013 Net New Construction	\$23,929,100	\$35,809,500	\$34,628,900	\$21,667,900	\$70,664,700	\$30,749,600	\$32,346,000	(\$578,400)
Rank	6							
2013 Net New Construction %	0.48%	0.60%	0.98%	0.79%	1.64%	0.67%	0.60%	-0.02%
Rank	7							
2011 Equalized Value	\$5,243,300,000	\$6,083,400,000	\$3,676,400,000	\$2,986,300,000	\$4,441,600,000	\$4,746,000,000	\$5,767,100,000	\$3,906,300,000
Rank	3							
2011 Property Tax Base Residential	63.5%	68.8%	70.9%	64.2%	63.9%	70.5%	65.8%	63.8%
Rank	8							
2011 Property Tax Base Commercial	29.5%	27.7%	22.3%	33.3%	25.5%	22.3%	26.6%	31.2%
Rank	3							
2011 Property Tax Base Manufacturing	2.8%	0.7%	3.7%	0.2%	7.0%	3.8%	4.2%	1.2%
Rank	5							
2011 Property Tax Base Other	4.3%	2.8%	3.1%	2.4%	3.7%	3.4%	3.4%	3.2%
Rank	1							

Source - 2013 DOR Net New Construction & Municipal Facts13

Attachment: 102213COWpower point (1773 : Strategic Planning)

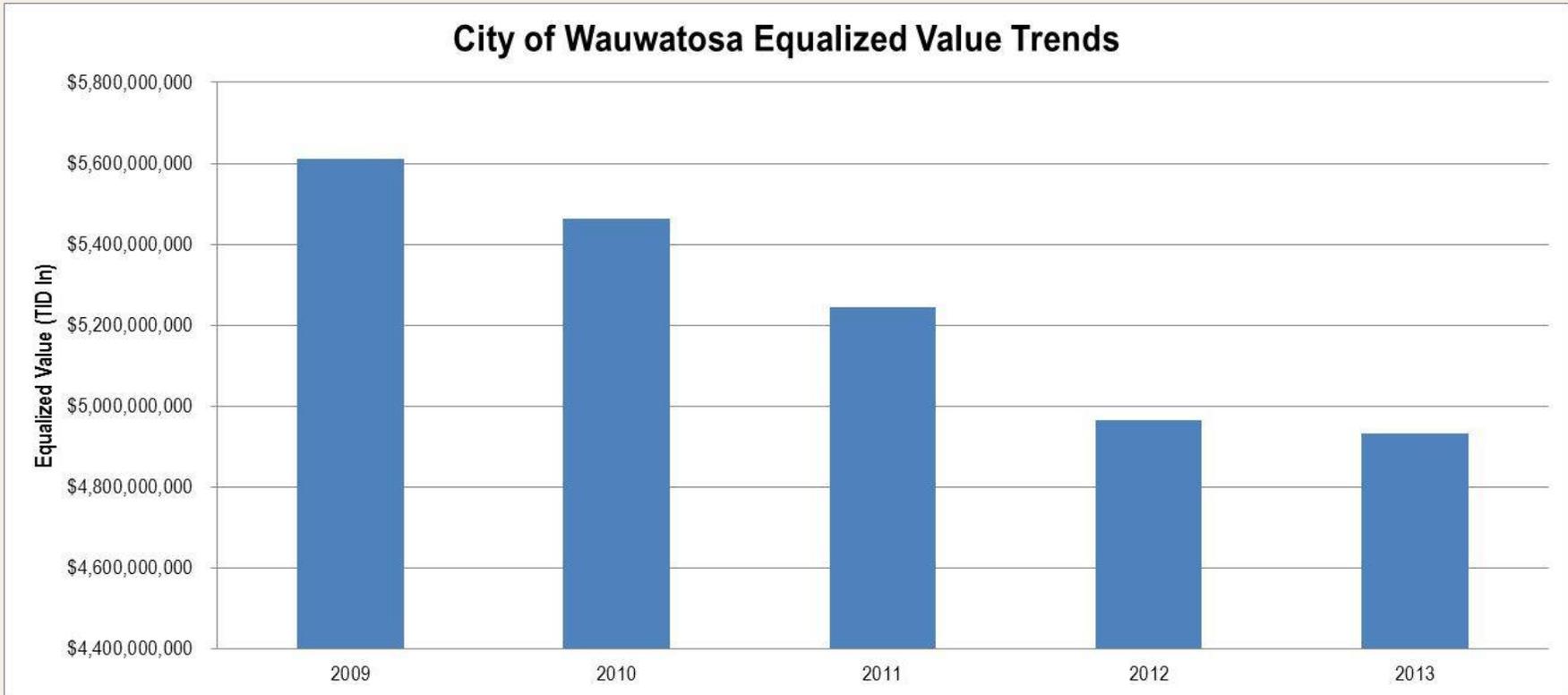
# Tosa Equalized Value & TID Comparison to Competitors

	Wauwatosa	Brookfield	Franklin	Greenfield	Menomonee Falls	Milwaukee	Waukesha	West Allis
2012 TID Value	\$291,068,300	\$200,206,900	\$235,197,400	\$98,856,400	\$454,230,000	\$1,574,117,800	\$412,288,900	\$147,085,600
2012 TID Increment	\$254,193,700	\$69,096,800	\$97,611,300	\$8,343,300	\$200,711,900	\$935,479,500	\$214,574,700	\$99,968,600
Infrement Return from Base (Active TIDs Only)	689%	53%	71%	9%	79%	146%	109%	212%
2012 Equalized Value	\$4,963,918,700	\$5,975,204,600	\$3,524,105,900	\$2,753,622	\$4,315,491,900	\$26,421,932,000	\$5,426,429,500	\$3,738,930,800
# of Active TIDs	5	1	2	2	9	42	11	10
# of Total TIDs	6	3	4	3	11	76	20	13
TIDs as % of Equalized Value	5.86%	3.35%	6.67%	3.59%	10.53%	5.96%	7.60%	3.93%

Source – 2012 DOR TIF Valuation Report

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Equalized Value Trends



	2009	2010	2011	2012	2013	5 Year Total	5 Year Average
<b>Equalized Value (TID In)</b>	\$5,610,122,800	\$5,462,436,300	\$5,243,279,500	\$4,963,918,700	\$4,932,992,500		
<b>Growth/(Decrease)</b>	(\$35,096,400)	(\$147,686,500)	(\$219,156,800)	(\$279,360,800)	(\$30,926,200)	(\$712,226,700)	(\$142,445,340)
<b>% Growth/(Decrease)</b>	-0.62%	-2.63%	-4.01%	-5.33%	-0.62%	-12.62%	-2.64%

Prepared by: Springsted Incorporated

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Forecast Operating Budget Gap

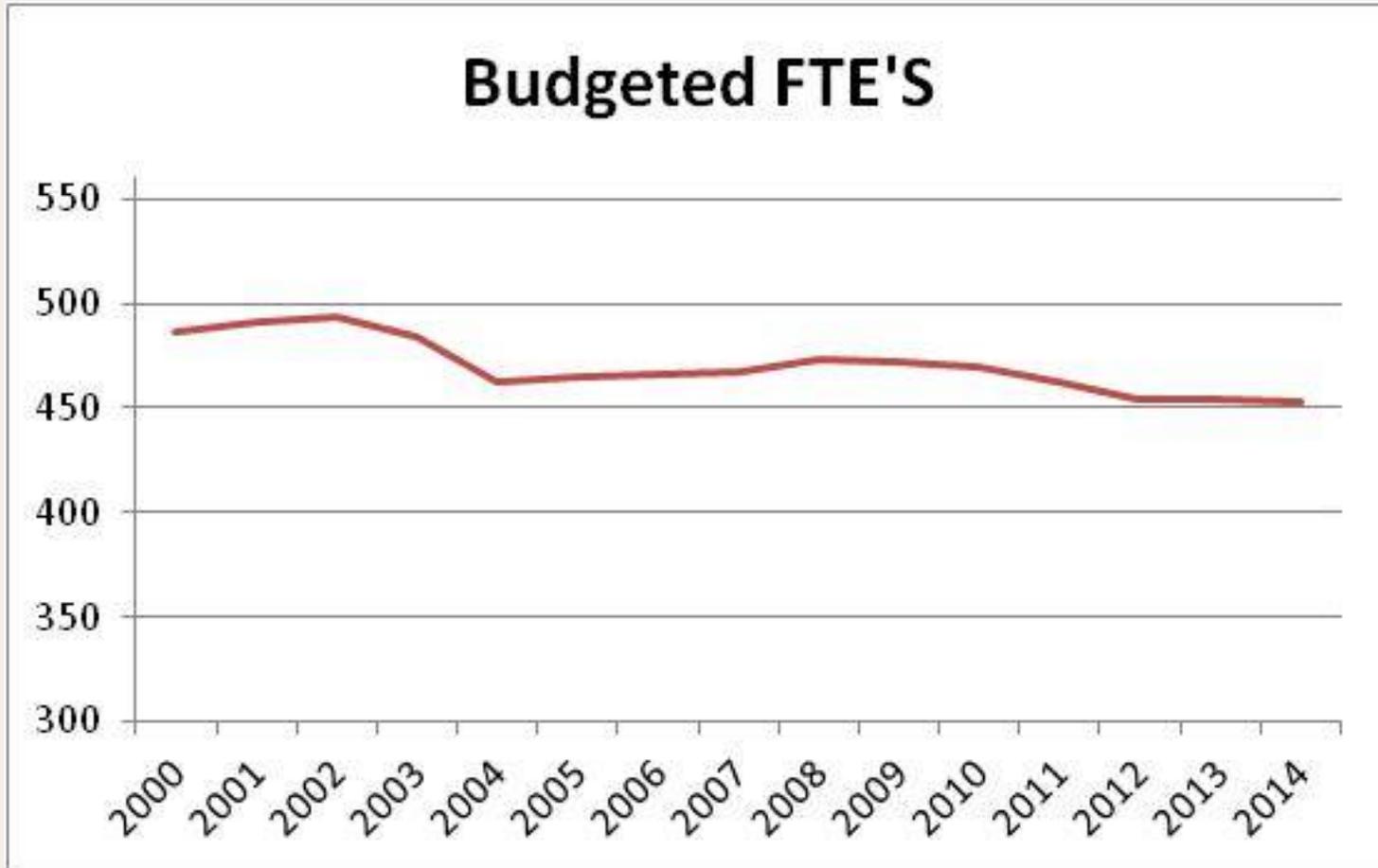


	Gap as % of Levy	Annual Operating Gap
2014	5.0%	\$1,423,907
2015	3.5%	\$1,059,208
2016	2.6%	\$578,838
2017	3.9%	\$997,094
2018	6.8%	\$1,753,412

Prepared by: Springsted Incorporated

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Staff “Strength of Bench”



Attachment: 102213COWpower point (1773 : Strategic Planning)

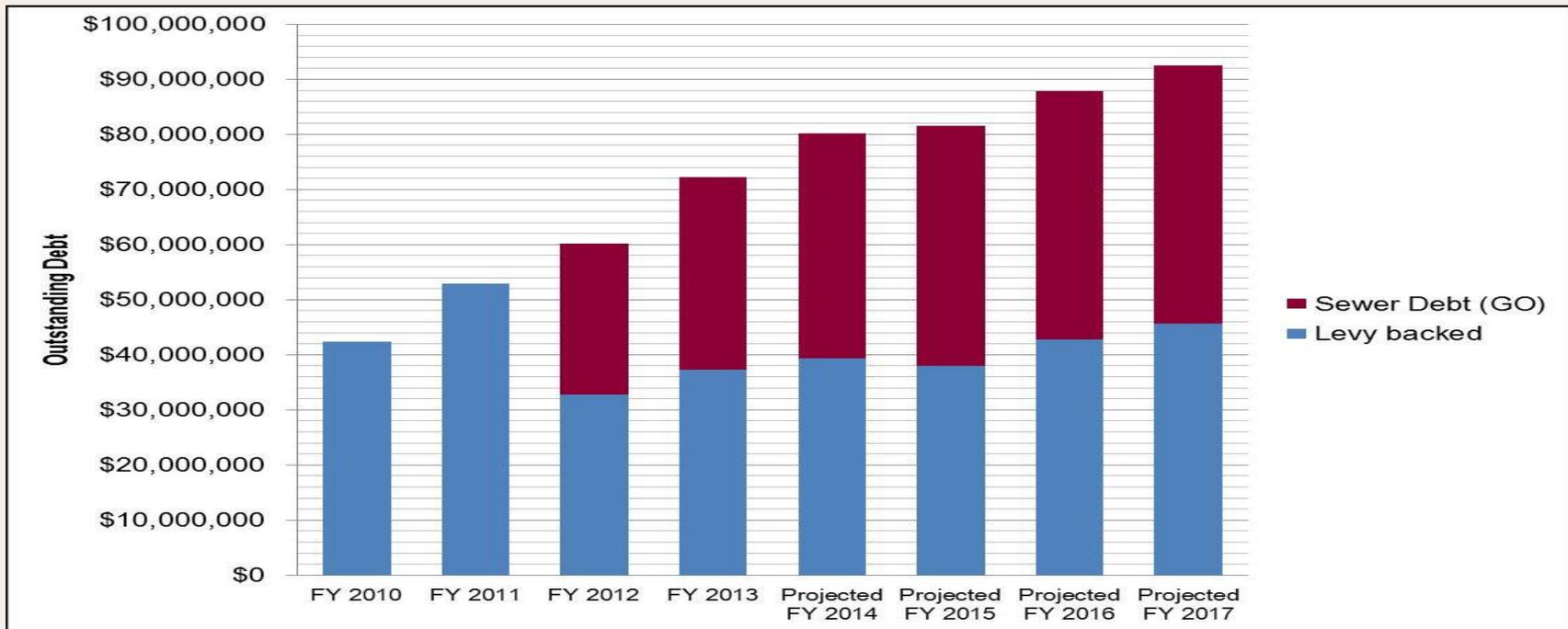
# Statement of Good Repair v. CIP

	2013			2014			2015		
	SOGR	CIP	Variance	SOGR	CIP	Variance	SOGR	CIP	Variance
Transportation	\$ 7,774,042	\$ 4,993,178	\$ (2,780,864)	\$ 8,085,003	\$ 6,052,813	\$ (2,032,190)	\$ 8,408,403	\$ 7,334,265	\$ (1,074,138)
Sanitary Sewers	\$ 3,783,866	\$ 12,822,583	\$ 9,038,717	\$ 3,935,220	\$ 5,450,496	\$ 1,515,276	\$ 4,092,628	\$ 3,836,795	\$ (255,833)
Storm Sewers	\$ 3,272,587	\$ 6,566,841	\$ 3,294,254	\$ 3,403,490	\$ 2,054,370	\$ (1,349,120)	\$ 3,539,629	\$ 2,630,093	\$ (909,536)
Water	\$ 3,425,134	\$ 3,630,720	\$ 205,586	\$ 3,562,139	\$ 5,046,200	\$ 1,484,061	\$ 3,704,624	\$ 3,895,000	\$ 190,376
Structures & Equipment	\$ 1,981,142	\$ 824,000	\$ (1,157,142)	\$ 2,060,388	\$ 1,735,000	\$ (325,388)	\$ 2,142,883	\$ 1,265,000	\$ (877,883)
Parks	\$ -	\$ 123,000	\$ 123,000	\$ -	\$ 800,000	\$ 800,000	\$ -	\$ 500,000	\$ 500,000
Other	\$ -	\$ 550,000	\$ 550,000	\$ -	\$ 550,000	\$ 550,000	\$ -	\$ 550,000	\$ 550,000
<b>TOTAL</b>	<b>\$ 20,236,771</b>	<b>\$ 29,510,322</b>	<b>\$ 9,273,551</b>	<b>\$ 21,046,240</b>	<b>\$ 21,688,879</b>	<b>\$ 642,639</b>	<b>\$ 21,888,167</b>	<b>\$ 20,011,153</b>	<b>\$ (1,877,014)</b>

	2016			2017			2013-2017		
	SOGR	CIP	Variance	SOGR	CIP	Variance	SOGR	CIP	Variance
Transportation	\$ 8,744,739	\$ 7,102,192	\$ (1,642,547)	\$ 9,094,528	\$ 7,445,158	\$ (1,649,370)	\$ 42,106,715	\$ 32,927,606	\$ (9,179,109)
Sanitary Sewers	\$ 4,256,333	\$ 3,243,016	\$ (1,013,317)	\$ 4,426,586	\$ 3,535,070	\$ (891,516)	\$ 20,494,633	\$ 28,887,960	\$ 8,393,327
Storm Sewers	\$ 3,681,214	\$ 2,348,598	\$ (1,332,616)	\$ 3,828,462	\$ 2,731,720	\$ (1,096,742)	\$ 17,725,382	\$ 16,331,622	\$ (1,393,760)
Water	\$ 3,852,888	\$ 2,960,000	\$ (892,888)	\$ 4,007,083	\$ 3,060,000	\$ (947,083)	\$ 18,551,868	\$ 18,591,920	\$ 40,052
Structures & Equipment	\$ 2,228,598	\$ 933,000	\$ (1,295,598)	\$ 2,317,741	\$ 1,385,000	\$ (932,741)	\$ 10,730,752	\$ 6,142,000	\$ (4,588,752)
Parks	\$ -	\$ 122,000	\$ 122,000	\$ -	\$ 10,000	\$ 10,000	\$ -	\$ 1,555,000	\$ 1,555,000
Other	\$ -	\$ 500,000	\$ 500,000	\$ -	\$ 1,000,000	\$ 1,000,000	\$ -	\$ 3,150,000	\$ 3,150,000
<b>TOTAL</b>	<b>\$ 22,763,772</b>	<b>\$ 17,208,806</b>	<b>\$ (5,554,966)</b>	<b>\$ 23,674,400</b>	<b>\$ 19,166,948</b>	<b>\$ (4,507,452)</b>	<b>\$109,609,350</b>	<b>\$107,586,108</b>	<b>\$ (2,023,242)</b>

Attachment: 102213COWpower point (1773 : Strategic Planning)

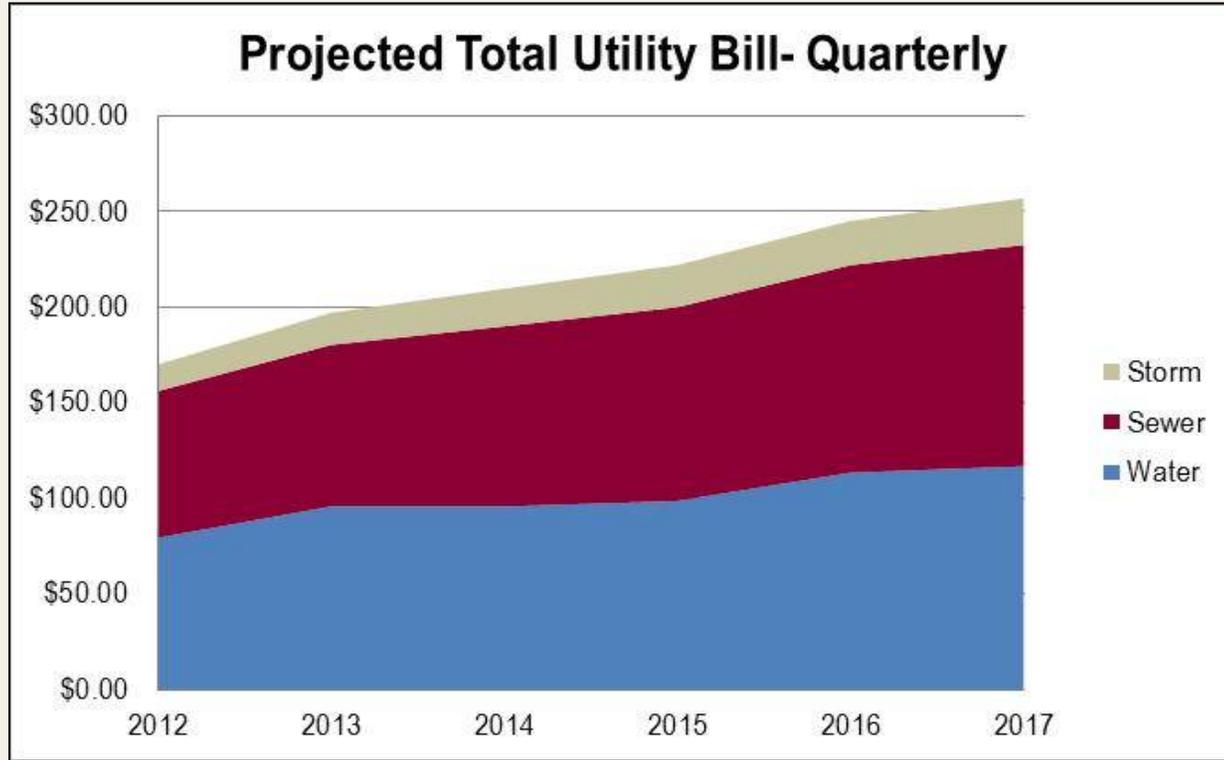
# Tosa Debt Forecast



	FY 2010	FY 2011	FY 2012	FY 2013	Projected FY 2014	Projected FY 2015	Projected FY 2016	Projected FY 2017
<b>Levy backed</b>	\$42,310,984	\$52,957,932	\$32,841,348	\$37,323,310	\$39,308,168	\$37,985,601	\$42,786,959	\$45,655,683
<b>Sewer Debt (GO)</b>			\$27,363,652	\$34,876,690	\$40,901,832	\$43,619,399	\$45,118,041	\$46,849,317
<b>Levy Debt Service</b>	\$5,427,001	\$4,143,262	\$3,860,769	\$4,114,480	\$4,554,447	\$4,811,492	\$5,351,003	\$5,822,126
<b>Equalized Value</b>	\$5,610,122,800	\$5,462,436,300	\$5,243,279,500	\$4,963,918,700	\$4,932,992,500	\$4,957,657,463	\$4,982,445,750	\$5,007,357,979
<b>GO Debt % of Equalized Value</b>	0.75%	0.97%	1.15%	1.45%	1.63%	1.65%	1.76%	1.85%
<b>Capacity to GO Debt Limit</b>	\$238,195,156	\$220,163,883	\$229,322,627	\$210,872,625	\$207,341,457	\$209,897,273	\$206,335,328	\$204,712,216

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Utility Rate Projections



	2012	2013	2014	2015	2016	2017
Water	79.24	95.66	95.66	98.53	113.31	116.71
Sewer	76.69	84.42	94.13	101.28	108.47	115.69
Storm	13.86	16.82	19.65	22	23.18	24.36

Attachment: 102213COW/power point (1773 : Strategic Planning)

# Planning Question #1

- Wauwatosha is impacted by so many variables – largely driven by external forces that we don't control as much of our destiny as we think we do. This is an increasingly important consideration in planning our future. We have to be more responsive to what is happening around and to us.
- We are in a perfect point in time; the economy is finally leveling off; our financial situation is stable; our elected leaders and staff are experienced and strong; we are in a position to largely control our own destiny.

## Planning Question #2

- Pressures on our resources and services require that we focus our energy on the relationship we have with our many partners. We have to expend more energy and time on collaboration to succeed in the long run. This has to be a high priority for us.
- There is so much going on within our City; our demands are greater than ever, that we need to have an internal focus; we must be involved in collaboration and service delivery discussions, but we need to pay attention to what is going on within our City first and foremost.

## Planning Question #3

- We are already pushing the limits with our programs and services and really can't do much more than we are already doing right now. It may not be ideal, but we need to be in a sustaining mindset.
- Now is the perfect time to move our City forward by taking more risks and stretching our goals and strategies. It may not sound right in today's environment, but we need to be more aggressive in planning our future.

# Common Council

Prioritize Strengths and Challenges

Attachment: 102213COWpower point (1773 : Strategic Planning)

# Management Team – Top Strengths

- Geographic Location
  - Proximity to regional amenities
- Economic Diversity
  - Future development opportunities
- Proactive Thinking
  - Current momentum
- Community Assets
  - Schools, Housing, Neighborhoods, Safety,

# Management Team – Top Challenges

- Manage Growth and Economic Development
  - Retain growing environment
- Preserve Core Services
  - Workforce, limited bench strength, fiscal realities, levy limits
- Governance and roles
- Maintain Infrastructure
- Impact of government relations
  - State policies, relationship with Milwaukee County
- Cost to Redevelop
  - Landlocked

# The Future

- What dreams and aspirations do we have for our City?
- What issues or projects are on our agenda in the next 1 to 3 years that will have lasting impact through the next decade?
- What are your legacy decisions that we will make today that the 2025 Council will compliment us on?
- What services do we provide today that we know will either not be provided or will be done differently in 2025?

# Implementation

- Take action to adopt a plan
- Assign and delegate responsibility
- Create symbols
- Integrate information into communication channels
- Share with staff and public
- Incorporate into future budgets
- Provide regular informal updates
- Conduct a formal review