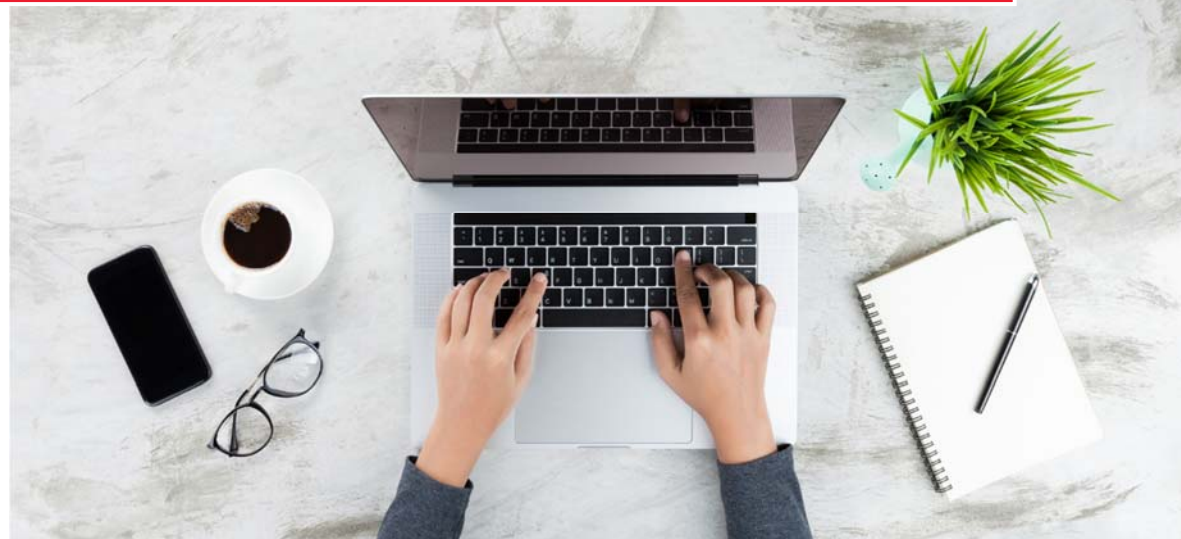




City of Milton 2020 – 2024 Strategic Plan



Approved October 20, 2020

**City of Milton, Wisconsin
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**City of Milton
2020-2024 Strategic Plan**

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Introduction

Dear Milton Community,

The Common Council and I embarked on developing the 2020-2024 Strategic Plan during an uncertain time for our community due to the COVID-19 pandemic. However, the Council anticipated potentially difficult decisions in the future and felt a need to engage with the community to determine where future efforts should be directed.

Various community engagement techniques were utilized to develop a broad picture of the Milton community so goals, objectives, strategies, and actions could be developed to provide a roadmap for the City of Milton organization to follow over the next five years and provide a guide when making important and difficult decisions.

We appreciate the support of the community during this endeavor. Thanks to all those who participated in the Community Survey, Community Workshop, and High School Student Focus Group. I'd also like to give a special thanks to our employees who participated in the Employee Survey and the Employee Focus Group. We also, thank Inga Cushman for her leadership and guidance throughout this process.

The 2020-2024 Strategic Plan will be reviewed on a quarterly basis to ensure we are meeting our established timelines. The plan will be updated on an annual basis in September. This will provide the Council with an opportunity to reassess or redirect, if needed. The plan will be fully updated using a similar process to what was used this year in the Summer/Fall of 2024.

Thank you to everyone who worked to make this plan possible. As the Common Council works through the strategic plan objectives, we will continue to involve the community and our employee groups because your input is important in making the strategic plan successful.

Let's get to work and together we will move Milton forward!

Sincerely,

Mayor Anissa Welch

Mission, Vision, Values

Mission

The City of Milton provides quality services to meet the needs of all community members and to cultivate a safe, diverse, and inclusive city in which people are proud to live.

Vision

The City of Milton, a community for all ages, is adaptive and innovative and aims to:

- Develop a resilient tax base through residential growth, small business attraction and retention, and industry expansion all with smart growth in mind.
- Recruit and retain employees with a commitment to the community and organization who strive for operational excellence.
- Provide a desirable standard of living for community members through quality and affordable services, recreational and life-long learning opportunities, and superior public safety services.
- Practice sound financial management to maintain a low debt level.
- Earn the community's trust through engagement, transparency, and communication.
- Encourage courageous leadership at all levels of the organization.

Values

1. **Integrity** – We practice the highest levels of integrity by being fair and consistent in decisions we make. We are honest and transparent when we ask questions of each other or when the community asks questions of us in order to build trust at all levels.
2. **Professionalism** – We exhibit top-level professionalism by being responsive and respectful to all community members and continually utilizing best practices in all aspects of our positions. We consistently go above and beyond to provide knowledge, resources, and services to community members. We practice safe behaviors on the job and provide skilled services to keep our community members safe.
3. **Inclusive** – We are inclusive and accepting of ideas from all of our community members, staff, and elected officials. We encourage dialogue to explore new ways to ensure people of diverse backgrounds feel welcome, included, and valued in our community.
4. **Fiscally Responsible** – We are fiscally responsible to ensure the City of Milton is in the best financial position for the future of the community.
5. **Creative** – We are creative in our approaches to new and existing problems. We will pivot and innovate in order to adjust to our new realities and to continue to provide quality services to all of our community members.

Goals, Objectives, Strategies, & Actions

The goals, objectives, strategies, and actions were developed with input from the Common Council, community members, and staff through focus groups, workshops, and surveys. The City of Milton appreciates every individual who contributed to the information gathering process to ultimately create the organization's road map for the next five years.

The overall goals for the next five years are as follows:



Affordability & Financial Stability

Improve the affordability of living in Milton while making informed short-term and long-term decisions to maintain the financial stability of the City of Milton.



Safe, Inclusive, Welcoming Community

Enhance our reputation of being a safe community while improving our efforts to be inclusive and welcoming to all community members.



Diverse Opportunities for Fun & Life-Long Learning

Continuously improve facilities and opportunities for recreation and life-long learning based on the needs and interests of our community members.



High Performing Organization with Professional Staff

Increase recruitment and retention efforts to ensure a professional workforce to provide high quality services to all community members.



Environment for Business Success with Thoughtful Growth & Development

Maintain economic development efforts in current and future business parks and increase small business retention strategies while creating an environment where businesses can be successful.

The following pages provide a detailed breakdown of how the City of Milton intends to achieve the stated goals.



Affordability & Financial Stability

Goal

Improve the affordability of living in Milton while making informed short-term and long-term decisions to maintain the financial stability of the City of Milton.

Objectives	Details
<p>Become debt free on non-building and non-TID debt.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Utilize fund balance above 30% for capital needs and funding of unfunded liabilities • Establish sustainable funding sources for equipment and infrastructure replacement • Utilize variable revenue sources for non-reoccurring expenditures • Continue to follow the established Debt Management Policy approved by the Common Council in 2018 and included in the appendix of this document. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • 2022 – Debt free for Sewer Utility • 2026 – Debt free for general projects • 2030 – Debt free for Water Utility <p>Objective Lead: Finance Director / Treasurer Dan Nelson</p>
<p>Increase planning efforts for future capital projects.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Develop a Capital Improvement Plan (CIP) to know and understand major future improvements and their financial impact and regularly review and update the document. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • CIP to be complete by the end of 2020. • CIP will be regularly reviewed and updated. <p>Objective Lead: City Engineer Mark Langer</p>
<p>Increase community engagement to improve understanding of the City of Milton’s finances</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Develop a complete budget document to provide explanation, graphs, diagrams, and other narration and visuals to provide easily understandable information to the public about the budget and state of finances for the City. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • By end of 2020 – Complete budget document for 2021

	<ul style="list-style-type: none"> • Review process and revise template as needed in subsequent years. <p>Objective Lead: Finance Director / Treasurer Dan Nelson</p>
<p>Explore and implement shared or consolidated services after thorough vetting process.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Continue exploration of consolidation with Janesville for Fire Protection and EMS / Paramedic Services <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • 2020 – Complete analysis of options and work with Joint Fire Commission on a final decision to determine steps forward. • 2021-2024 – Implement preferred option. <p>Objective Lead: Mayor Welch and Milton Common Council Joint Fire Commission Representatives</p>



Safe, Inclusive, Welcoming Community

Goal

Enhance our reputation of being a safe community while improving our efforts to be inclusive and welcoming to all community members.

Objectives	Details
<p>Develop annual diversity and inclusion training for staff and provide other opportunities for employees to participate in diversity and inclusion discussions.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Establish a designated date for diversity and inclusion training to take place annually for staff. • Select topics to be covered each year, 2021 through 2024. • Engage with potential speakers to develop the annual training program for staff. • Provide employees with the opportunity to participate in the annual YWCA Racial Justice conference. Serve as a sponsor for the program in 2020. • Encourage employees to participate in the Courageous Conversations discussions hosted by the Rock County Diversity Action Team, YWCA Rock County, and Community Action. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Determine date, topic, and presenter by end of 2020 calendar year for training in 2021. • Decide whether the training will be in-person or virtual due to the on-going COVID-19 pandemic. • Determine date and topic for training days in 2022, 2023, and 2024. <p>Objective Lead: Mayor Welch and City Administrator Al Hulick</p>
<p>Increase opportunities for conversations and training for the community related to diversity and inclusion</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Engage with potential facilitators for discussions and create a schedule. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop a plan and schedule for 2021 by the end of 2020. <p>Objective Lead: Mayor Anissa Welch</p>
<p>Maintain Wisconsin Law Enforcement Accreditation Group (WILEAG) accreditation</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Successfully complete on site assessment for reaccreditation.

	<ul style="list-style-type: none"> • Complete work between assessments to maintain best standards. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • On-site assessment for reaccreditation – October 2020 • On-site assessment for reaccreditation – Fall 2023 <p>Objective Lead: Police Chief Scott Marquardt</p>
<p>Increase emergency planning and response efforts.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Complete revision of the City’s All Hazards Plan • Conduct tabletop and functional drills with all City employees • Regional and intergovernmental cooperation with other public safety groups, School District of Milton, City departments, and other organizations. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • All Hazards Plan updates to be complete by the end of 2021 • Tabletop exercises and functional drills to be scheduled on an annual basis. <p>Objective Lead: Police Chief Scott Marquardt</p>
<p>Increase engagement with the community</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Conduct an annual survey with consistent questions to gauge community satisfaction over time and use the results to inform policy and process improvements. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Draft survey to be completed by March 2021. • Survey available to community members to complete in April 2021. • Survey results to be available by June 2021. • Repeat process annually. <p>Objective Lead: Ald. Bill Wilson</p>
<p>Increase diversity and quality of housing</p>	<p>Strategies & Actions</p> <ul style="list-style-type: none"> • Increase communication and engagement with Milton area landlords and developers. • Work with federal, state, and regional organizations and regional developers.

	<ul style="list-style-type: none"> • Explore opportunities to expand Residential Exterior Improvement Grant Program to cover all areas of the City. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Finalize research of opportunities to expand Residential Exterior Improvement Grant Program to cover all areas of the City by February 2021. • Develop a comprehensive list of landlords with properties in the City of Milton by March 2021, preferably with emails included. • Develop a comprehensive list of developers in the Milton region by the end of 2020. • Establish a date for a rental property discussion on a topic of interest to local landlords by June 2021. <p>Objective Lead: City Administrator Al Hulick</p>
Improvement of the local environment	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Plant a variety of species of trees throughout the city on an annual basis. • Beautification of the City through improvements to the planned natural environment. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop list of recommended trees to plant, and make it available to the public by March 2021. • Establish a comprehensive tree planting plan for the City of Milton to include locations and preferred species by end of 2021. • Expand the Crossridge Park Prairie, and determine if additional locations exist in the City of Milton for prairie seed by the end of 2021. <p>Objective Lead: Public Works Director Howard Robinson / Administrative Services Director Inga Cushman</p>
Increase accessibility for all levels of abilities (physical, cognitive, etc.)	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Evaluate services and facilities and develop plans to ensure accessibility for all community members. • Encourage accessibility of businesses and research the possibility of a grant program or expansion of the existing façade grant program for exterior improvements utilizing TIF funds. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop ADA Transition Plan for the City of Milton by the end of 2021.

	<ul style="list-style-type: none"> Finalize research and potential development of a grant program or expansion of existing façade grant program by June 2021 for exterior improvements to businesses to increase accessibility. <p>Objective Lead: City Administrator Al Hulick</p>
Collaborate with nonprofits to enhance the quality of life of community members	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> Promote volunteer opportunities at nonprofits and the potential for skill development for careers. Promote the utilization of www.liveunitedbr.org/volunteer by more community nonprofit organizations to connect with potential volunteers for their organizations. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> Create list of volunteer opportunities by end of 2020. Create promotional plan for volunteer opportunities at nonprofits by the March 2021. Develop an annual nonprofit summit to discuss needs and potential areas of collaboration by the end of 2021. <p>Objective Lead: City Administrator Al Hulick</p>
Support Veterans and other individuals completing major life transitions while becoming part of our community	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> Develop an awareness campaign to connect and direct individuals to identified resources. Information should be available on the City’s website, social media, and other communication outlets. Increase referral of individuals in need to 211 for assistance. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> Develop list of resources by end of 2020. Add list of resources to the City’s website by the end of 2020 and promote resources on a continual basis. Add information about 211 to the City’s website by the end of 2020. Regularly review and update the list of resources as needed. <p>Objective Lead: City Administrator Al Hulick</p>
Respond to emerging and on-going safety issues	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> Coordinate efforts with regional nonprofit organizations and other government partners including Milton Area Youth Center, Milton Youth

	<p>Coalition, and Rock County Anti-Human Trafficking Task Force.</p> <ul style="list-style-type: none">• Request representation or involvement from City of Milton staff or elected officials where appropriate. <p><i>Timeline to Achieve Objective:</i></p> <ul style="list-style-type: none">• Determine opportunities for representation on organization boards or committees where appropriate by the end of 2020.• Monitor emerging and on-going safety issues on a continual basis. <p><i>Objective Lead:</i> Police Chief Scott Marquardt</p>
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Diverse Opportunities for Fun & Life-Long Learning

Goal

Continuously improve facilities and opportunities for recreation and life-long learning based on the needs and interests of our community members.

Objectives	Details
<p>Complete, follow, and regularly review the 2020-2024 Comprehensive Outdoor Recreation Plan.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> Engage with community members about the parks and recreation facilities to ensure the plan continues to reflect the needs of the community until it expires. Include in the plan the provision of free or low-cost recreation opportunities for all community members (trails, sledding, disc golf, etc.) <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> Complete the CORP in October 2020. Create a project plan by the end of 2020 to review the document annually and complete a full update in 2024. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Increase life-long learning opportunities in the community</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> Provide support to the Milton Public Library as needed for programming and life-long learning opportunities Increase promotion of educational opportunities at the Crossridge Park prairie, Tower Hill Park prairie, and other prairies in the City. Promote and encourage opportunities for art, music, and theatre. Collaborate with School District of Milton, Blackhawk Technical College, and other educational institutions in the area. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> Continue to solicit artists for pieces in Story Gardens Develop a strategic plan for art pieces throughout the City by the end of 2021. Create a promotions plan for the prairie seed collection events by June 2021. Engage with educational institutions about providing programming related to items of environmental concern by March 2021.

	<p>Objective Lead: Administrative Services Director Inga Cushman / Library Director Ashlee Kunkel</p>
<p>Improve bike-ability and walk-ability of the community</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Repair/designate bike/pedestrian path along N. Janesville Street • Add benches in strategic locations throughout the City. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Determine cost for N. Janesville Street improvements by end of 2020, and program the improvement in the CIP. • Create strategic bench placement plan and fundraising guide by March 2021. <p>Objective Lead: City Engineer Mark Langer / Administrative Services Director Inga Cushman</p>
<p>Increase awareness and understanding of Milton’s history</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Add interpretive signage to parks and key locations in the community. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop a plan for interpretive signs throughout the City by March 2021 <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Maintain partnership with Ice Age Trail Alliance and improve the trail system in the City of Milton where possible.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Add fun signage to the trail indicating how many steps to locations of interest to hikers. • Promote awareness of the Ice Age Trail in the community. • Explore opportunities for accessibility on the trail. • Promote volunteer opportunities through the Rock County Chapter of the Ice Age Trail Alliance. • Promote programs sponsored by the Ice Age Trail Alliance. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop plan for signs on the Ice Age Trail by the end of 2021. • Share at least one item related to the Ice Age Trail on social media bi-weekly. • Complete research on accessibility opportunities on the Ice Age Trail by the end of 2021.

	<p>Objective Lead: Mayor Welch and Administrative Services Director Inga Cushman</p>
<p>Milton East Cemetery Improvement Project</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Enhance the appearance of the cemetery entrances along N. Janesville Street. • Assist in cleaning, straightening, and repair of grave markers as practical. • Create a number system to identify individuals buried in the cemetery. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Determine price and program in CIP replacement of the chain link fence along N. Janesville Street by end of 2020. • Install a historic-focused identification sign between the two driveway entrances in 2021. • Install plot number system in 2022. <p>Objective Lead: Ald. Larry Laehn</p>



High Performing Organization with Professional Staff

Goal

Increase recruitment and retention efforts to ensure a professional workforce to provide high quality services to all community members.

Objectives	Details
<p>Maintain a low turnover rate of less than 5% each year.</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Increase employee engagement through improved internal communication strategies. • Develop a Stay Interview program to improve retention efforts. • Create a formal performance review system for all departments. • Create formal professional development plans for all employees. • Ensure compensation is commensurate with similar sized organizations and municipalities in the geographic area. • Review benefits provided to employees on an annual basis to ensure they are competitive regionally and research emerging benefits public and private sector employers are providing. • Provide our staff with appropriate equipment to allow employees to complete their assigned job tasks • Ensure appropriate staffing levels for each department. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop a communications plan that includes internal communication strategies by the end of 2021. • Implement a Stay Interview program by the end of 2022. • Implement a formal performance review system for all departments that includes professional development plans by the end of 2023. • Complete annual reviews of compensation and benefits. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Improve recruitment</p>	<p>Strategies & Actions</p> <ul style="list-style-type: none"> • Analyze recruitment plans for improvements and additional sources to market open positions. • Create a formal onboard system for new hires. • Develop an organizational culture that values and promotes inclusivity of all individuals.

	<p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop a recruitment form, which includes potential sources for advertising, by end of 2021. • Implement a formal onboard process for all new hires in the City of Milton by the end of 2021. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Understand the skills and abilities available among the current staff</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Review and update job descriptions for all positions within the organization at least every three years with employee input and when the positions are posted for recruitment. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Plan which job descriptions will be reviewed in 2021, 2022, 2023, and 2024. • Inform employees whose job descriptions are up for review and the timeline for completion. Reviews will begin in February and be complete by October of each year. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Foster an environment where safety while performing job duties is a primary focus</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Develop a comprehensive safety manual for all departments • Develop a comprehensive training program related to safety for all departments and positions <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Create safety training plans for each position using the Training Genius tool provided by CVMIC by the end of 2020. • Discuss organization-wide training needs during the annual work plan process with the City of Milton’s representatives from CVMIC in the spring of 2021. • Develop a plan and timeline for regular training for all employees by October 2021. • Complete comprehensive safety manual with input from staff and CVMIC by the end of 2021. <p>Objective Lead: Administrative Services Director Inga Cushman</p>

<p>Review all employment policies regularly to ensure they are current related to organizational practices, applicable laws, and best practices and ensure employees understand the policies and procedures.</p>	<p><i>Strategies & Actions:</i></p> <ul style="list-style-type: none"> • Complete a review of all employment policies on a rotating five year program. • Develop a comprehensive training program related to the City’s employment policies and Employment Practices Liability (EPL) for all departments and positions. • Review internal policies to ensure best practices related to diversity and equal opportunities for employment and inclusion within the workplace. <p><i>Timeline to Achieve Objective:</i></p> <ul style="list-style-type: none"> • Follow policy review schedule established in the 2019 version of the Employee Handbook & Policy Manual. • Create a training plan related to EPL using the Training Genius tool provided by CVMIC by the end of 2020. • Research processes other municipalities are using to review policies and practices related to diversity and equal opportunities. <p><i>Objective Lead:</i> Administrative Services Director Inga Cushman</p>
<p>Increase engagement with prospective alderpersons</p>	<p><i>Strategies & Actions:</i></p> <ul style="list-style-type: none"> • Develop mentor program with prospective alderpersons and those currently serving or who previously served. • Explore partnership with the Milton Area Chamber of Commerce (MACC) and other organizations or programs (MACC’s Milton Leadership Institute, Rock County Leadership Development Academy, etc.). <p><i>Timeline to Achieve Objective:</i></p> <ul style="list-style-type: none"> • Create a mentor program, explore partnerships, and develop an outreach plan by November of 2021. <p><i>Objective Lead:</i> Mayor Anissa Welch and City Clerk Leanne Schroeder</p>
<p>Develop programs with the high school to inform students about local government and potential volunteer opportunities or elected positions</p>	<p><i>Strategies & Actions:</i></p> <ul style="list-style-type: none"> • Research and potentially create Explorer programs • Develop a Youth Commission • Create a student representative position on the Council <p><i>Timeline to Achieve Objective:</i></p> <ul style="list-style-type: none"> • Complete research on adding a student representative to the Council by February 2021.

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| | <ul style="list-style-type: none">• Complete the development of a Youth Commission and hold the first meeting by October 15, 2021. |
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Objective Lead: Mayor Anissa Welch, Ald. Theresa Rusch, and Library Director Ashlee Kunkel



Environment for Business Success with Thoughtful Growth & Development

Goal

Maintain economic development efforts in current and future business parks and increase small business retention strategies while creating an environment where businesses can be successful.

Objectives	Details
<p>Increase tourism efforts to help support businesses in the community</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Continue partnership with Janesville Area Convention & Visitors Bureau (JACVB) and explore other potential partnerships. • Develop additional strategic tourism relationships with other entities in the region and state. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Budget funding to continue partnership for tourism services with JACVB in 2021, 2022, 2023, and 2024. • Continue designation as a Connect Community through the Wisconsin Economic Development Corporation (WEDC) by budgeting funds for the membership in 2021, 2022, 2023, and 2024. • Require a representative from the staff or elected officials to participate in at least two training programs offered through the Connect Communities program in 2020, 2021, 2022, 2023, and 2024. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Encourage ongoing reuse, restoration, and beautification of historic buildings</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Utilize tools from the economic development toolbox. • Provide educational opportunities to individuals interested in historic preservation of their properties. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Schedule educational programs with the Historic Preservation Commission in odd numbered years related to preservation of historic properties. <p>Objective Lead: Administrative Services Director Inga Cushman</p>
<p>Ensure the TIDs are not highly leveraged/indebted in order to be nimble to future opportunities</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Ensure that any debt/risk for a project would have a “backup” funding source so as not to put the burden on the general tax levy.

	<ul style="list-style-type: none"> • Ensure that incentives are structured that the taxpayers are not taking on all the risk <p>Timeline to achieve objective:</p> <ul style="list-style-type: none"> • This objective will be on-going. <p>Objective Lead: City Administrator Al Hulick</p>
<p>Promote opportunities available for small business assistance</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Promote Small Business Development Loan Program available through the City of Milton. • Promote Façade Grants available through the City of Milton. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop promotions plan for the Small Business Development Loan Program and Façade Grant Program by June 2021 <p>Objective Lead: City Administrator Al Hulick</p>
<p>Reduce barriers for business and residential development</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Review ordinances for potential barriers for businesses to be successful. • Review ordinances related to residential developments to ensure consistency and comparability with other regional communities and current development practices. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • Develop a plan to systematically review ordinances by the end of 2021. • Complete review of the ordinances by end of 2022. <p>Objective Lead: City Administrator Al Hulick</p>
<p>Continue to build and maintain infrastructure (streets, water and sewer lines, stormwater, etc.) to support future economic development projects (industrial, commercial, and residential).</p>	<p>Strategies & Actions:</p> <ul style="list-style-type: none"> • Monitor the needs of the City and continually update the Capital Improvement Program (CIP). • Review project proposals for common trends related to infrastructure. <p>Timeline to Achieve Objective:</p> <ul style="list-style-type: none"> • This objective will be on-going. <p>Objective Lead: City Administrator Al Hulick</p>

<p>Identify and secure additional land opportunities in the Crossroads Business Park and other strategic locations</p>	<p><i>Strategies & Actions:</i></p> <ul style="list-style-type: none">• Leverage strategic relationships and increase possible partnerships with entities in the region and state. <p><i>Timeline to Achieve Objective:</i></p> <ul style="list-style-type: none">• This objective will be on-going. <p><i>Objective Lead:</i> City Administrator Al Hulick</p>
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Appendices

Appendix A – Demographics

Appendix B – City of Milton Debt Policy

Appendix A - Demographics

	2010 Census	2013-2017 ACS
Male	49%	53%
Female	51%	47%
Under 5 years	354	373
5 to 9 years	423	338
10 to 14 years	417	424
15 to 19 years	386	307
20 to 24 years	312	389
25 to 34 years	807	733
35 to 44 years	762	828
45 to 54 years	775	594
55 to 59 years	329	422
60 to 64 years	290	256
65 to 74 years	330	608
75 to 84 years	257	170
85 years and over	104	124
Median Age	35.8	37.4
White	96%	95.9%
Black or African American	0.5%	1.9%
American Indian or Alaska Native	0.2%	0%
Asian	1%	0%
Native Hawaiian or Other Pacific Islander	0%	0%
Some Other Race	1.1%	0.5%
Two or More Races	1.1%	1.7%
Hispanic or Latino (of any race)	2.4%	3.6%
Not Hispanic or Latino	97.6%	96.4%
Housing Units	2,382	2,360
Occupied Units	2,231	2,322
% Owner Occupied	66%	65%
% Rental Occupied	34%	35%
Owner-Occupied Unit Median Value	\$143,700	\$136,000
Median Gross Rent	\$752	\$814
Households	2,231	2,322
Average Household Size	2.48	2.39
Family Households (Families)	1,499	1,423
Average Family Size	2.98	3.02
Total Civilian Noninstitutionalized Pop.	5,515	5,557
With a Disability	659*	801
Under 18 years old	1,430*	1,378
With a Disability	58*	69
18 to 64 years old	3,415*	3,286
With a Disability	410*	369
65 years and over	670*	893
With a Disability	191*	363

*2009-2013 American Community Survey 5-Year Estimates

Appendix B
City of Milton, WI
Debt Management Policy

Policy Statement:

The purpose for the Debt Management Policy is to provide a general framework for the use, management and reporting of the City's debt financing. The primary objective of the policy is to establish conditions for the use of debt and to create policies that minimize the City's debt service and issuance costs, retain a high credit rating in the financial community, and to maintain full and complete financial disclosure and reporting. In addition to adhering to this Debt Management Policy, the City's financing will also be in compliance with applicable Federal law, U.S. Securities and Exchange Commission (SEC), Wisconsin State Statutes, City Code, and other regulatory requirements.

Reason for Policy:

The City's Debt Management Policy is the guideline for City staff to use in recommending debt in order to assure the community that the City is well-managed, financially sound, and to obtain financing at the lowest cost. It will be the responsibility of the Finance Director, or designee, to recommend debt on behalf of the City. Upon City Council approval, the Finance Director, or designee, will coordinate to ensure that all financings are issued in full compliance with related laws and regulations. Any substantive modifications made to this policy must be approved by the City Council.

Guidelines for Use

Debt is a financing tool which should be used when the City has legal, financial and market debt capacities and will be considered when some or all of the following conditions exist:

1. The City will consider all available financing tools for funding projects including inter-fund borrowing, use of fund reserves, State of Wisconsin Trust Fund loan program, external financing (local and publically issued) and lease-purchasing;
2. Pay as you go financing will be used to fund general capital projects whenever feasible;
3. When bonds or promissory notes are the desired financing vehicle, the issue will be bid in a competitive manner;
4. The term of the financing will not exceed the useful life of the capital project, facility or equipment financed

Types of Permitted Debt:

The City may utilize several types of municipal debt obligations to meet its financing objectives. All long-term debt financing shall be approved by the City Council. A list of the types of permitted debt for the City and the general guidelines for their use is as follows:

General Obligation Debt

General obligation debt is authorized to be issued by the City in the following variations: promissory note, State Trust Fund loan, refunding bonds, and corporate purpose bond. The term of general obligation debt is limited to 20 years from the original date of issuance.

Legal Debt Capacity

In accordance with Wisconsin Statutes, total general obligation indebtedness of the City shall not exceed 5 percent of the equalized value of taxable property within the City's jurisdiction. The City's

goal is to maintain a ratio of not more than 50 percent of the legal debt limit.

Net Direct General Obligation Debt/Full Value

The general obligation debt ratio is measured by total outstanding general obligation long-term debt as of December 31 of each year, compared to the most recent year’s equalized value. In planning capital projects and proposed financing, the effect on this ratio should be considered. General obligation debt supported by funds other than general obligation property tax revenues will not be included in this ratio. It shall be the responsibility of the Finance Director, or designee to calculate the general obligation debt ratio annually.

Debt Service Levy/Total Levy

The goal of the City is to not exceed a maximum 13 percent ratio of property tax supported debt service costs to the annual property tax levy. This will ensure that the debt service payment remains affordable to the property owners in the City. At the time this policy was adopted, the ratio was 26 percent.

This ratio will be measured by annual property tax supported debt service cost in relation to annual property tax levy. A maximum ratio of thirteen percent is desired with future borrowing structured to maintain this ratio. General obligation debt supported by funds other than general property tax revenues will not be included in this ratio. This will be calculated after the annual audit.

Debt Service Repayment

The goal is to repay new City general obligation debt within ten years, with debt for equipment to be repaid within five years. If new debt for the following of asset types is issued, the following guidelines should dictate the repayment timeframe:

1. If the asset has a motor and is less than \$50,000, the maximum repayment period shall be 3 years or less.
2. If the asset has a motor and is more than \$50,000, the maximum repayment period shall be 5 years or less.
3. If the asset is replacing infrastructure (road, utility main, etc.), the maximum repayment period shall be 7 years or less.
4. If the asset is for the purpose of building new infrastructure (road, utility main, etc.), the maximum repayment period shall be 10 years or less.
5. If the use of funds is to renovate or build a structure (such as a buildings), the maximum repayment period shall be 10 years or less.
6. If the funding source is not repaid through the property tax levy, the repayment period shall be the lower of the best estimate of revenue generation or useful life of the asset for a period no greater than 20 years (including refinancing/refunding periods).

Debt Service Reserves

Debt service reserves will be established by bond ordinances to adequately meet debt service requirements as required.

Revenue Bonds

Chapter 66.066 of the Wisconsin State Statute governs the issuance of revenue bonds. The term of revenue bonds is limited to 40 years from the original date of issuance.

Revenue Bond Uses

Revenue bond issues must be applied solely for purchasing, acquiring, leasing, constructing, extending, adding to, improving, conducting, controlling, operating or managing a public utility, and in the payment of the cost of any subsequent necessary additions, improvements, and extensions.

Interest Payments

Interest on the revenue bonds shall be paid to the bondholders according to the interest schedule set by the debt schedule. Payment of principal on the revenue bonds shall start no later than three years after the date of issue, or two years after the estimated date that the project will be completed, whichever is later.

Debt Service Repayment

It shall be the goal to follow the same repayment guidelines as those of general obligation issues.

State Trust Fund Loans

The Board of Commissioners of Public Lands (BCPL) may loan funds to the City for any project undertaken for a public purpose consistent with the purposes allowed for issuance of general obligation or revenue bonds. State trust fund loans shall be considered by the City when the interest rate offered makes the cost of borrowing less than or comparable to external financing notes or bonds after considering the cost of issuance.

State Trust Fund Loan Uses

The City may use general obligation state trust fund loans of 10 years or less to facilitate the performance of the City, including operations and maintenance.

The City can also use general obligation state trust fund loans greater than 10 years for the financing or refinancing of public purpose projects including, the acquisition, leasing, planning, design, construction, development, extension, enlargement, renovation, rebuilding, repair or improvement of land, waters, property, highways, buildings, equipment, or facilities.

General obligation state trust fund loans can also be utilized as a source of funding for economic development projects. Loans include pass-through loans for private development, funding development incentives, TID infrastructure loans, land acquisition, and development for business parks.

The term of general obligation state trust fund loans is limited to 20 years from the original date of issuance.

State Trust Fund Loan Payments

If the City has an active general obligation state trust fund loan, annual payments are due to the BCPL annually by March 15. Loans funded between September 1 and March 14 do not have a payment scheduled for the following March 15.

State Trust Fund Loan Prepayments

The City Council may authorize prepayments without penalty after January 1 and before August 31 annually, with 30 days prior written notice.

Other Obligations

There may be special circumstances when other forms of debt are appropriate and if their use is necessary or advantageous to the City. Their use may be evaluated by the Finance Director, or designee, on a

case-by-case basis. If other types of debts are utilized, applicable state and federal guidelines shall be followed.

Bond Record Retention

The Finance Director, or designee shall keep all records in compliance with the rules and regulations applicable to bonds pursuant to code and law including:

Records

- The transcript of proceedings (the official “record book”);
- Information showing how the proceeds of the bonds, including investment earnings on the bonds, are spent, which may include invoices and checks or other variable information;
- Records regarding the use of the project or prior project, including any private business use;
- Records, certifications, and opinions relating to any change of use of the project or prior project, including remedial action certificates and opinions;
- Documentation pertaining to any investment of proceeds of the bonds (bank or account statements, confirmations for the purchase and sale of securities, yield calculations for each class of investments, actual investment income received on the investment of proceeds, guaranteed investment contracts and rebate calculations)

Retention: Final Payment

The Finance Director, or designee shall retain such records until at least three years following the final payment of the bonds or the final payment of any issue or issues of tax-exempt bonds or notes refunding the bonds.

Retention: Refunding

If the bonds are refunded in the future, the Finance Director, or designee should keep the above information until three years after final redemption of the refunding obligations.

Arbitrage

Arbitrage rebates are paid to the government to prevent several problems from occurring including: the issuance of more bonds than are necessary; to prevent the issuance of bonds earlier than is necessary; to prevent bonds from remaining outstanding longer than is necessary.

The City shall use bond proceeds only for the purpose and authority for which the bonds were issued. In most circumstances, the City will want to avoid arbitrage rebates and will follow the following exemptions. However, in some circumstances the City may want to pay the arbitrage rebate. The reasons for paying the arbitrage rebate will be outlined by the Finance Director, or designee when issuing bonds.

Exemptions

Under 26 U.S. Code 148, exemptions for arbitrage rebate that the City should follow includes:

Small Issuer Exception

- The issue is issued by a governmental unit with general taxing powers;
- The aggregate face amount of all tax-exempt bonds issued by the City during the calendar year is not to exceed \$5 million;
- No bond which is part of such issue is a private activity bond;
- At least 95 percent of the net proceeds of such issue are to be used for local government activities by the issuer;

Spending (spend down) Over \$5 Million Exceptions

- 6 months – 10 percent of bond proceeds
- 12 months – 45 percent of bond proceeds
- 18 months – 75 percent of bond proceeds
- 24 months – 100 percent of bond proceeds (If the City can spend down 95 percent of the bond within the 24 months, the City shall have 36 months to spend down 100 percent of the bond)
- “Bona fide” debt service funds, subject to a limit of \$100,000 on annual earnings in the case of private activity bonds or governmental bonds that do not have a fixed rate of interest and a maturity of at least five years
- Payment of 1.5 percent penalty in lieu of arbitrage rebate no later than 90 days after the end of the spending period to which it relates
- Proceeds invested in tax-exempt obligations

Spend Down Schedules and Exceptions

During the process of issuing any type of debt, the Finance Director, or designee working with the project manager will provide spend down estimates of the debt. The Finance Director, or designee is also responsible for monitoring the actual spending of the debt and exercise best efforts to spend down bond proceeds in such a manner that the City will meet one of the spend-down exemptions from arbitrage rebate.

Spend down exceptions provide for the majority, 95 to 100 percent, of the bond proceeds to be spent down within two years of the issuance of debt. The specific date of the spend down goal shall be the settlement day/close date of the debt.

Reporting

All of the City’s tax-exempt issues, including lease purchase agreements, are subject to arbitrage compliance regulations. In accordance with IRS recommended practices, the Finance Director, or designee shall calculate arbitrage rebate computations no later than each five-year anniversary date of the issuance of the bond and at the final maturity for all bonds.

If any arbitrage rebate liability exists, the Finance Director, or designee shall report such liability in the year-end financial statements.

Arbitrage Rebates

Arbitrage rebates were created as a financial disincentive in order to prevent abuses. According to 26 U.S. Code 148, the arbitrage rebate will be treated as meeting the requirement only if an amount equal to the sum of the excess of the following is paid to the United States by the issuer:

- The excess of the amount earned on all nonpurpose investments and any income attributable to the excess amount earned;
- The amount which would have been earned if such nonpurpose investments were invested at a rate equal to the yield on the issue

Due Date of Arbitrage Rebate Payments

The amount which is required to be paid to the Internal Revenue Service (IRS) by the Finance Director, or designee, or financial consultant, shall be paid in installments which are made at least once every 5 years. Each installment shall be in an amount which ensures that 90 percent of the required amount is paid. The last installment shall be made no later than 60 days after the day on which the last bond of

the issue is redeemed and shall be in an amount sufficient to pay the remaining balance that the City is required to pay.

A series of issues which are redeemed during a 6-month period shall be treated as one issue for purposes of the preceding sentence if no bond which is part of any issue in such series has a maturity of more than 270 days or is a private activity bond.

In the case of a tax and revenue anticipation bond, the last installment shall not be required to be made before the date 8 months after the date of issuance of the issue of which the bond is a part.

Continuing Disclosure

The City's debt obligations are subject to SEC Rule 15c2-12 (Rule), which regulates the timing and production of disclosure documents by brokers, dealers and underwriters of the City's securities.

Dealer's Requirements

The Rule requires dealers, when underwriting certain types of municipal securities, to ensure that the City, which is issuing the bonds, enters into an agreement to provide certain information to the Municipal Securities Rulemaking Board about the securities on an ongoing basis.

Required Information

Continuing disclosure agreements must require the following information:

Annual Financial Information

- The City's financial information and operating data as included in original official statement;
- The City's audited financial statements

Event Notices

Notice of any of the following 14 listed events with respect to the City's debt obligations must be reported within 10 business days:

- Principal and interest payment delinquencies;
- Non-payment related defaults;
- Unscheduled draws on debt service reserves reflecting financial difficulties;
- Unscheduled draws on credit enhancements reflecting financial difficulties;
- Substitution of credit or liquidity providers, or their failure to perform;
- Adverse tax opinions or events affecting the tax-exempt status of the security;
- Modifications to rights of security holders;
- Bond calls and tender offers;
- Defeasances;
- Release, substitution or sale of property securing repayment of the securities;
- Rating changes;
- Bankruptcy, insolvency or receivership;
- Merger, acquisition or sale of all issuer assets;
- Appointment of successor trustee

The following events with respect to the City's debt obligations can be voluntarily reported within 10

business days:

- Amendment to continuing disclosure undertaking;
- Change in obligated person;
- Notice to investors pursuant to bond documents;
- Certain communications from the Internal Revenue Service;
- Secondary market purchases;
- Bid for auction rate or other securities;
- Updates to capital or other financial plans;
- Quarterly strategic plan updates;
- Litigation/enforcement action;
- Change of tender agent, remarketing agent, or other on-going party;
- Derivative or other similar transaction;
- Other event-based disclosures

Exemptions

Continuing disclosure generally is not required for an issue if:

- The entire issue is for less than \$1 million;
- The bonds are sold to investors in units of no less than \$100,000 and are sold to no more than 35 sophisticated investors;
- The bonds are sold in \$100,000 minimum denominations and mature in nine months or less from initial issuance;
- The bonds were issued prior to July 1995 (or prior to December 1, 2010 for certain
- “puttable” securities.)

Electronic Municipal Market Access (EMMA)

EMMA provides free online access to disclosure information for municipal obligations. The Finance Director, or designee, or contracted financial consultant, must provide continuing disclosure documents electronically to the Municipal Securities Rulemaking Board through EMMA annually by the date specified in the continuing disclosure agreement, generally within 365 days of the year end.

Contracted Financial Consultant

The City may contract with a financial consultant to help comply with its continuing disclosure agreements, certificates and undertakings associated with each issue of securities subject to the Rule.

Reporting

In the event for which an event notice is to be filed, the Finance Director, or designee, shall provide disclosure information related to the event to EMMA, as required.

Selecting and Retention of Service Providers

The City recognizes the nature of the municipal bond industry such that specialized consultants may need to be retained. The Finance Director, or designee, is responsible for establishing a solicitation and selection process for securing professional services that are required to help implement the City’s debt management policy. The following contract advisors can be maintained for the City:

- Underwriters
- Bond Counsel

- Special Counsel
- Financial Advisor

Professional financial consultants in connection with the City’s debt management policy may be chosen through a request for qualifications process. If this process is used, the request for qualification process will be designed to select providers that offer the City the best combination of expertise and price. The objectives of the process will be to:

- Promote competition;
- Be as objective as possible;
- Incorporate clear and rationale selection criteria;
- Be independent of political influence;
- Be perceived as fair by the respondents;
- Result in cost-effective transaction;
- Result in the selection of the most qualified firm(s)

The City is not required to select the firm offering the lowest price. However, in cases where the lowest bidder is not recommended, the Finance Director, or designee, must provide a justification for the recommendation. All contracts will be approved by the City Council.

Credit Ratings

With any changes in the City’s credit ratings, the Mayor, City Council and the City Administrator will be notified by the Finance Director.

Rating Agency Relationships

The Finance Director is responsible for maintaining relationships with the rating agencies that currently assign ratings to the City’s various debt obligations. This effort shall include providing periodic updates on the City’s financial condition along with coordinating meetings in conjuncture with a new debt issuance.

Use of Rating Agencies

The Finance Director will be responsible for determining whether or not a rating will be requested on a particular financing and which of the major rating agencies will be asked to provide such a rating.

Definitions:

Arbitrage: According to 26 U.S Code 148, arbitrage is related to the use of tax-exempt proceeds for reinvestment in higher yield taxable securities and the excessive accrual of interest revenue from bond proceeds.

Capital Improvement Plan (CIP): A multi-year financial planning tool that identifies capital projects for the City. The CIP is the primary tool used to plan for debt.

Capital Projects: The acquisition, creation, or improvement of City land, buildings, equipment, and infrastructure with a useful life of greater than one year and a minimum threshold of \$5,000.

Continuing Disclosure: According to the SEC Rule 15c2-12, continuing disclosure consists of important information about a municipal bond that arises after the initial issuance of the bonds. This information generally reflects the financial health or operating condition of the City as it changes over

time, or the occurrence of specific events that can have an impact on key features of the bonds.

General Obligation (G.O.) Bonds: Debt issued by the City to finance any project undertaken for a public purpose. General obligation bonds are backed by the full faith and credit of the City.

Promissory Note: A signed document containing a written promise to pay a stated sum to a person or institution at a specific date or on demand.

Refunding Bond: A bond that retires another bond before the first bond matures. Primarily used due to a decline in the interest rates.

Revenue Bonds: Bonds issued to finance public utilities or projects with a dedicated revenue stream. Repayment is made from the revenues generated. Revenue bonds give the City the ability to recover the cost of a project from beneficiaries of the project or users of the facility.

State Trust Fund Loans: The Board of Commissioners of Public Lands (BCPL) of the State of Wisconsin has funds available to loan to Wisconsin cities. These “trust funds” are derived primarily from the sale of public lands and from penal fees.