



# CITY OF MIDDLETON STRATEGIC PLAN



ADOPTED: NOVEMBER 1, 2022

# TABLE OF CONTENTS

<b>Introduction</b> .....	<b>1</b>
What is a Strategic Plan? .....	1
Why Do a Strategic Plan? .....	2
Why Do a Strategic Plan <b>Now</b> ? .....	2
Planning Process .....	2
<b>Middleton Today: Assets and Opportunities</b> .....	<b>4</b>
Demographics and Key Indicators, 2020 .....	4
Assets .....	6
Opportunities .....	8
<b>The City of Middleton Organization Today</b> .....	<b>11</b>
Financial Review .....	11
Operational Review .....	11
Opportunities .....	12
<b>Interviews and Outreach</b> .....	<b>13</b>
Summary of Department Head Interviews .....	13
Summary of City Council Interviews .....	14
Summary of Vision Panels Input .....	15
Summary of Public Input .....	17
<b>Diversity, Equity, and Inclusion in Middleton</b> .....	<b>19</b>
<b>Comprehensive Plan (2021)</b> .....	<b>20</b>
<b>Vision</b> .....	<b>21</b>
Mission .....	21
Core Principles .....	21
Communication & Engagement .....	22
Strategic Framework .....	22
<b>Implementation Action Plan</b> .....	<b>24</b>
How to use this Plan .....	24
Implementation Action Plan Organization .....	25

**Affordability & Livability.....26**  
 Vision:.....26  
 Key Observations/Considerations: .....26  
 Value to Residents: .....26  
 Reflection Questions: .....26  
 Recommended Actions:.....27

**Transportation, Infrastructure & Technology .....29**  
 Vision:.....29  
 Key Observations/Considerations: .....29  
 Value to Residents: .....29  
 Reflection Questions: .....29  
 Recommended Actions:.....30

**Business Development.....33**  
 Vision:.....33  
 Key Observations/Considerations: .....33  
 Value to Residents: .....33  
 Reflection Questions: .....33  
 Recommended Actions:.....34

**Recreation & Wellness.....37**  
 Vision:.....37  
 Key Observations/Considerations: .....37  
 Value to Residents: .....37  
 Reflection Questions: .....38  
 Recommended Actions:.....38

**Public Safety & Emergency Management.....41**  
 Vision:.....41  
 Key Observations/Considerations: .....41  
 Value to Residents: .....41  
 Recommended Actions:.....42

<b>City Organizational &amp; Community Development</b> .....	<b>44</b>
Vision:.....	44
Key Observations/Considerations: .....	44
Value to Residents: .....	45
Reflection Questions: .....	45
Recommended Actions:.....	46

# INTRODUCTION

Following the completion of the City of Middleton’s Comprehensive Plan in 2021, the City embarked on the creation of a strategic plan that will serve as a roadmap for future decision making and organizational development. The following Strategic Plan lays out a 10-year vision for the community and the City of Middleton (the City) as a governmental and employment organization. The Plan also provides a strategic framework of recommendations focused on 5-year action items. This plan was developed through a community-based planning process that included strong City staff input and leadership and input and guidance from a variety of community stakeholders.

## What is a Strategic Plan?

A strategic plan is a future-oriented organizational plan that engages City stakeholders, both internally as a government and in the community, to:



The strategic planning process seeks to harmonize the City’s many different plans with its available or anticipated resources and would help guide City services and initiatives over the next 5-10 years. This plan will not duplicate or replace any of the City’s other plans, but is designed to dovetail existing plans and to identify and align existing or potential resources (staffing and funding) with the City’s primary goals.

## Why Do a Strategic Plan?

Strategic planning is a helpful organizational process that can increase the likelihood that the City will successfully meet its goals and achieve its future vision. Additional benefits of strategic planning include:

- Building consensus and engagement of all stakeholders
- Establishing systems of accountability
- Clarifying priorities
- Analyzing the organization’s strengths, weaknesses, opportunities, and threats
- Creating mechanisms for evaluating progress

## Why Do a Strategic Plan Now?

The City is at a crossroads for maintaining its high service level due to a variety of factors:

- Political constraints require that any property tax growth comes from new growth in the tax base.
- City is physically limited in growth beyond its boundaries.
- Infill development has been politically contentious, yet it will continue to be the primary way the City can grow its tax base.
- Maintaining general fund expenses is limited to annual tax growth, without growth the City will have reduce or cut services.

The Strategic Plan provides specific, actionable steps to advance the City’s goals and vision during these times of change and pressure.

## Planning Process

The Strategic Plan development process was led by a team of consultants in coordination with City staff and a Strategic Plan Advisory Committee that was assembled with input from City staff and the Common Council. The Advisory Committee was comprised of Middleton residents and leaders from a variety of backgrounds. The planning process also included six Vision Panels. The Vision Panels were focused on key issue areas and were comprised of representatives and stakeholders with first-hand knowledge of those issues.

The planning process included a number of public input opportunities, including a Public Visioning Workshop, a Public Meeting to review the Vision and Strategic Framework, and a final Public Role-Out Event. Each public input event included online survey materials to expand public participation.

The graphic on the following page outlines the key stages and events of the planning process.

## Advisory Committee

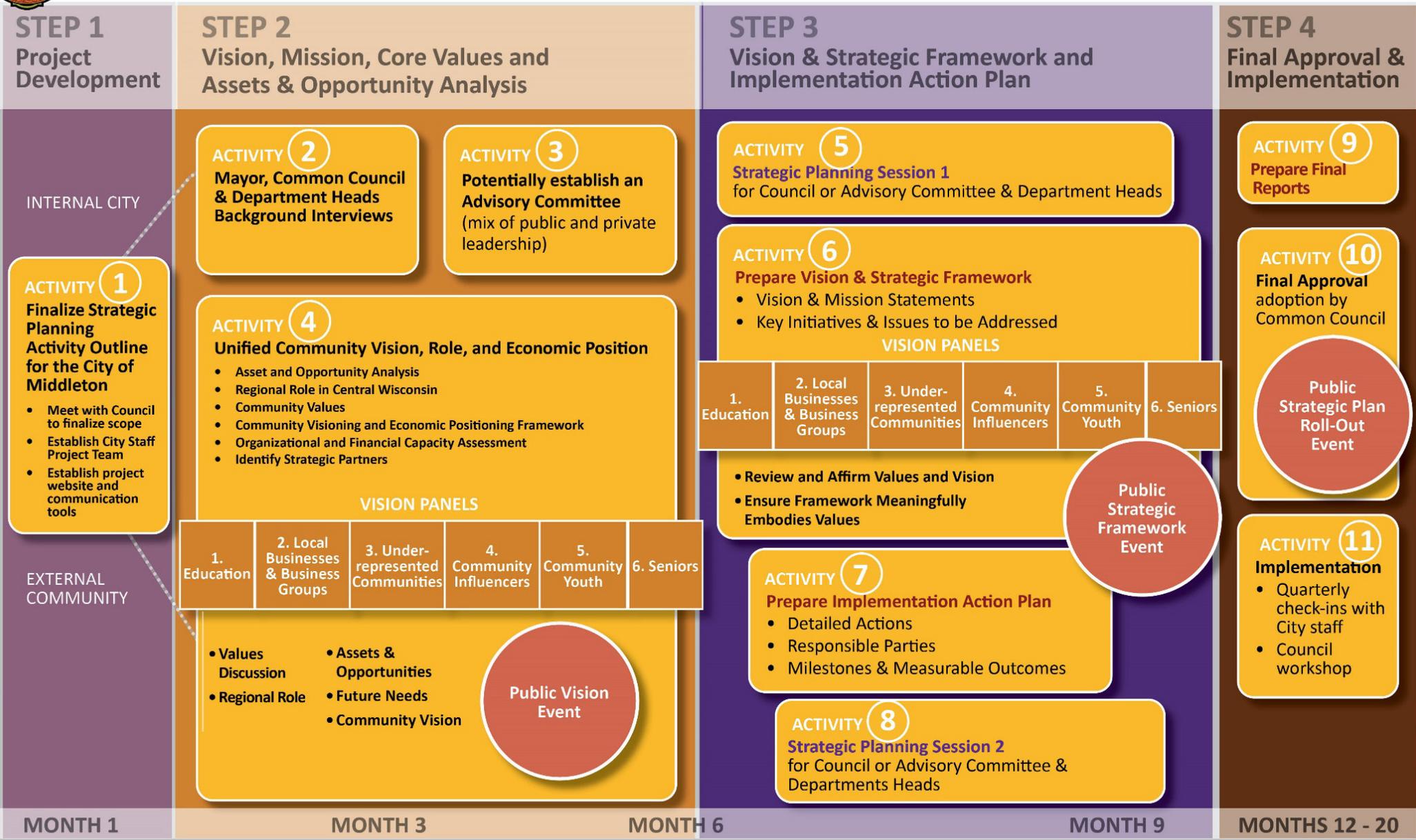
**Purpose:** Serve as a connection between the community and the Council in the Strategic Plan process and act as a sounding board on plan elements and initiatives. The Advisory Committee will not make a formal recommendation to Council.

## Vision Panels

**Purpose:** Build on public input gathered during the Comprehensive Planning process to connect with populations that are often underrepresented; engage community members that don’t typically participate in these types of processes; bring a unique perspective to the process; and represent the core functions of the community.

- Education
- Local Business
- Under-represented Communities
- Community Influencers
- Community Youth
- Seniors

# MIDDLETON STRATEGIC PLAN PROCESS



Vandewalle & Associates, Inc. + EQT by design EQT By Design + Public Administration Associates, LLC

September 15, 2021

# MIDDLETON TODAY: ASSETS AND OPPORTUNITIES

The asset and economic opportunity analysis summarizes Middleton’s existing plans and initiatives and discussions with staff, elected officials, and vision panels to identify and describe community assets that help define the City and the opportunities for future growth and advancements of the City’s values and priorities. This analysis was first grounded in an understanding of the community today, including its demographics and key indicators.

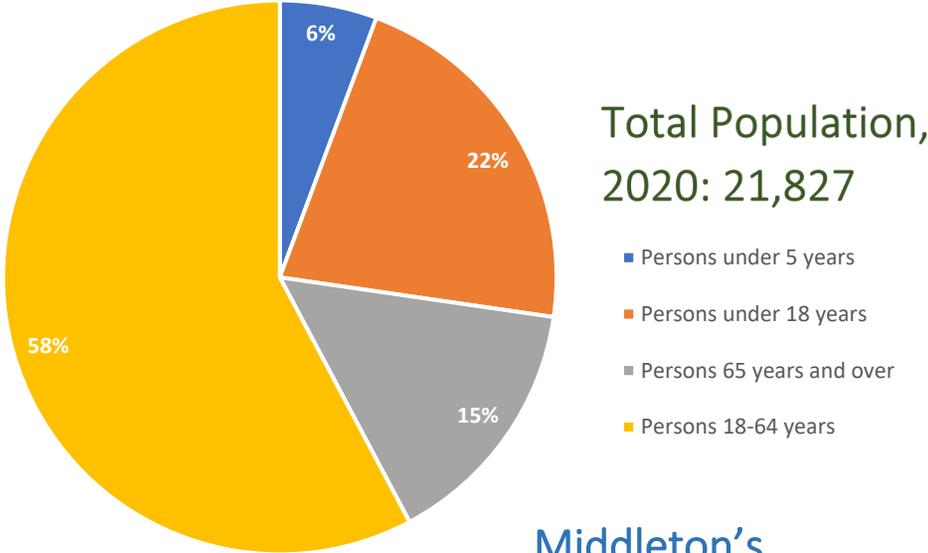
## Demographics and Key Indicators, 2020

Race and Ethnicity, 2020	
White	82.50%
Black or African American	5.10%
American Indian and Alaska Native	0.20%
Asian	5.60%
Native Hawaiian and Other Pacific Islander	0%
Two or More Races	4.10%
Hispanic or Latino	5.40%

Source: U.S. Census, 2020 Decennial Census

Housing Units, 2020	
Owner Occupied Rate	49.90%
Median Value of Owner-Occupied Units	\$361,000
Median Selected Monthly Owner Costs (w/Mortgage)	\$2,053
Median Selected Monthly Owner Costs (w/o Mortgage)	\$887
Median Gross Rent	\$1,095

Source: U.S. Census, 2020 Decennial Census



Total Population, 2020: 21,827

- Persons under 5 years
- Persons under 18 years
- Persons 65 years and over
- Persons 18-64 years

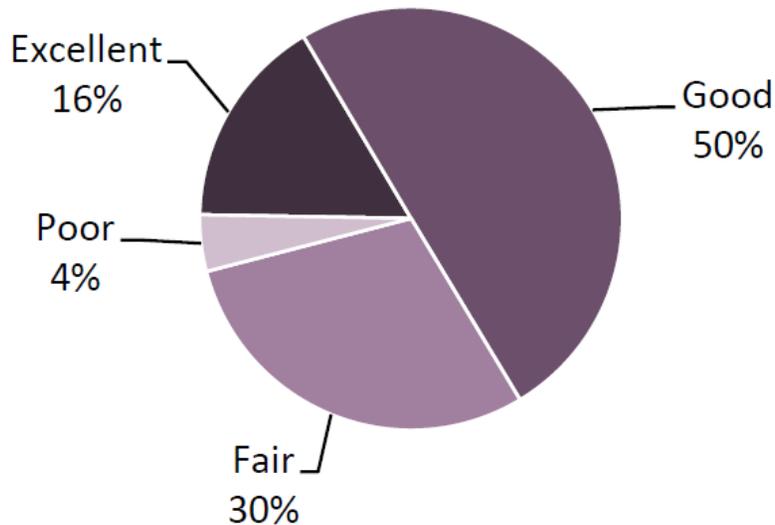
Middleton’s Population increased by 25% from 2010 to 2020

### City of Middleton Projected Job Growth

	2020	2035	2050
<b>Projected Employment</b>	<b>25,417</b>	<b>29,081</b>	<b>32,745</b>
Sector Employment			
Other	5,078	6,070	7,062
Retail	3,236	3,442	3,648
Services	17,104	19,569	22,035
Sector % of Employment			
Other	20.0%	20.9%	21.6%
Retail	12.7%	11.8%	11.1%
Services	67.3%	67.3%	67.3%

Source: City of Middleton Comprehensive Plan 2021

## RESIDENTS' CONNECTION AND ENGAGEMENT WITH THEIR COMMUNITY



National Community Survey - Community Livability Report 2021

### PERCENT EXCELLENT or GOOD



National Community Survey - Community Livability Report 2021

## MIDDLETON JOBS



National Community Survey - Community Livability Report 2021

## Assets

The City of Middleton's strongest assets and defining characteristics are described below:

**Regional Location:** Middleton's location and position in the region make it accessible to larger metro-areas while keeping its small-town feel.

**Good Neighbor City:** The City has a community-focused culture as the Good Neighbor City that is seen and felt by its residents and visitors.

**Transportation and Access:** Its transportation connectivity and accessibility to the region make Middleton an easy place to get around.

**Public Safety:** Middleton's commitment to public safety is valued by residents and prioritized by City leaders.

**Schools:** The City's high quality schools attract new people to the community and serve its residents and families.

**Economic Diversity:** Middleton's economic diversity and varied tax base, which includes business and employment centers, helps make it more resilient and less reliant on property tax revenues like more residential-oriented communities.

**Recreation & Greenspace:** Middleton is defined by its recreation, greenspace, and natural amenities, including the Pheasant Branch Conservancy. These assets contribute to Middleton's high quality of life.

**Historic Downtown:** Middleton's historic downtown is a vibrant economic core that sets Middleton apart from other Dane County communities, making it a regional destination.



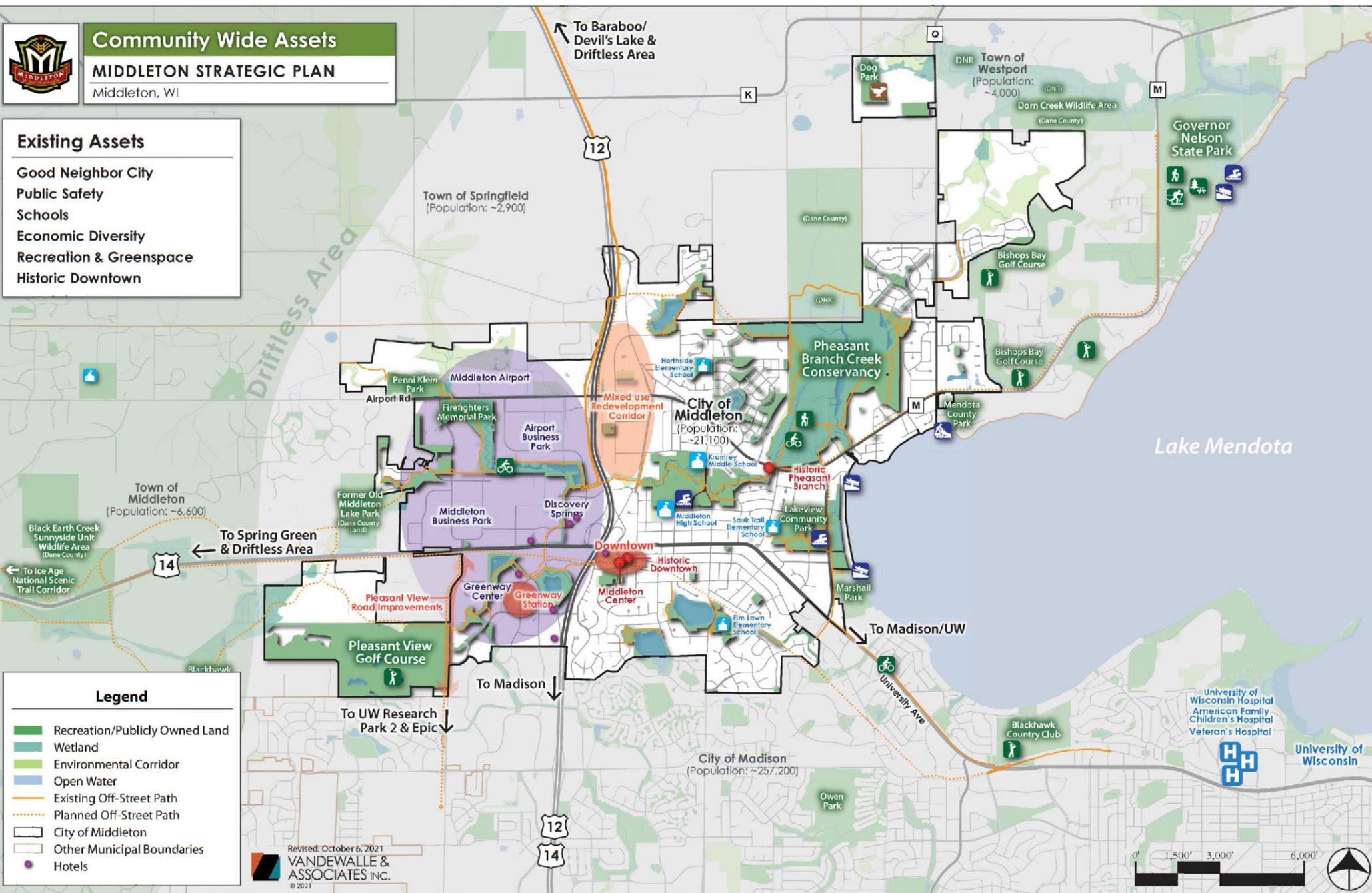
# Community Wide Assets

## MIDDLETON STRATEGIC PLAN

Middleton, WI

### Existing Assets

- Good Neighbor City
- Public Safety
- Schools
- Economic Diversity
- Recreation & Greenspace
- Historic Downtown



### Legend

- Recreation/Publicly Owned Land
- Wetland
- Environmental Corridor
- Open Water
- Existing Off-Street Path
- Planned Off-Street Path
- City of Middleton
- Other Municipal Boundaries
- Hotels

Revised: October 6, 2021  
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## Opportunities

The following is a summary of a high-level economic opportunities that represent potential economic and community drivers for the future. *No prioritization or preference is intended by the ordering of opportunities.*

### Infill Growth and Missing Middle Housing

- As housing prices increase, expanding owner-occupied attached housing options can increase the diversity of housing options in Middleton and increase housing accessibility.
- Given limited areas for residential growth beyond the City's current boundaries, infill and redevelopment opportunities will be the main source of residential growth.
- Increased housing options at a variety of price points will address the missing middle of housing options.

### Growth Through Inclusion and Diversity

- The City of Middleton has taken numerous steps to prioritize diversity and inclusion in the City and have raised it as a key value.
- The City should look for opportunities to increase the diversity of resident participation in City committees, commissions, and elected offices.
- Increasing diversity in the City workforce will ensure that the City's departments better represent the resident population.

### Continue to Invest and Value Sustainability

- Continue to work and invest toward becoming a renewable energy powered city.
- Implement City projects that reduce the impacts of climate change.
- Invest in public infrastructure that advances these goals, including EV charging and solar.
- Identify and plan for Battery Storage Districts that build resiliency in Middleton's energy system.

### Grow High-Tech Companies

- Continue to attract high-tech companies offering quality jobs.
- Develop a job incubator with educational connections to the school district to expand the workforce development pipeline.
- Encourage and foster entrepreneurship to further diversify the City's employer base and expand economic opportunities for residents.

### Excursion Rail to and from Downtown Madison

- Explore excursion rail or special event trolley to regional event venues.
- Create routes that connect to destinations like sports, music, and entertainment venues.
- Connect Middleton hotels to Downtown Madison to make Middleton a choice of visitors to the region.
- Opportunities for partnerships, such as hotel guests receiving a free ride to Camp Randall.

### Infrastructure for Continued Airport Safety Compliance

- Continue to make improvements to maintain airport safety compliance and keep it a modern, functional facility.
- The airport serves diverse users, including private, business, flight education, and medical transport. Investments are needed to keep the airport safe and functional for these groups.

### Implement the North Mendota Parkway

- The North Mendota Parkway will allow regional traffic to circulate outside of the City limits, relieving congestion within the City.
- Increasing Middleton’s accessibility and connectivity by moving regional traffic around the northside of the metro area.

### Be a Leader in Stormwater Management

- Middleton is located at the north end of the Chain of Lakes, giving it a critical position in the regional water system.
- Expanding the greenway will increase Middleton’s ability to address and mitigate future stormwater issues and adverse rain events.
- Installing new stormwater detention areas upstream will expand the capacity of the stormwater management system.

### Integrated Mass Transit

- Bus Rapid Transit and completion of a Phase 2 study represents an opportunity to improve public transit access in Middleton.
- Current bus service with Madison Metro can be improved over time as Middleton densifies, expanding and increasing existing bus routes.
- Future-oriented mobility options, including Autonomous Loopers, can solve “last mile” connection issues by linking neighborhoods to transit.
- Improved mass transit can connect employees to job locations as well, removing transportation barriers to employment opportunities.



# Community Wide Opportunities

## MIDDLETON STRATEGIC PLAN

Middleton, WI

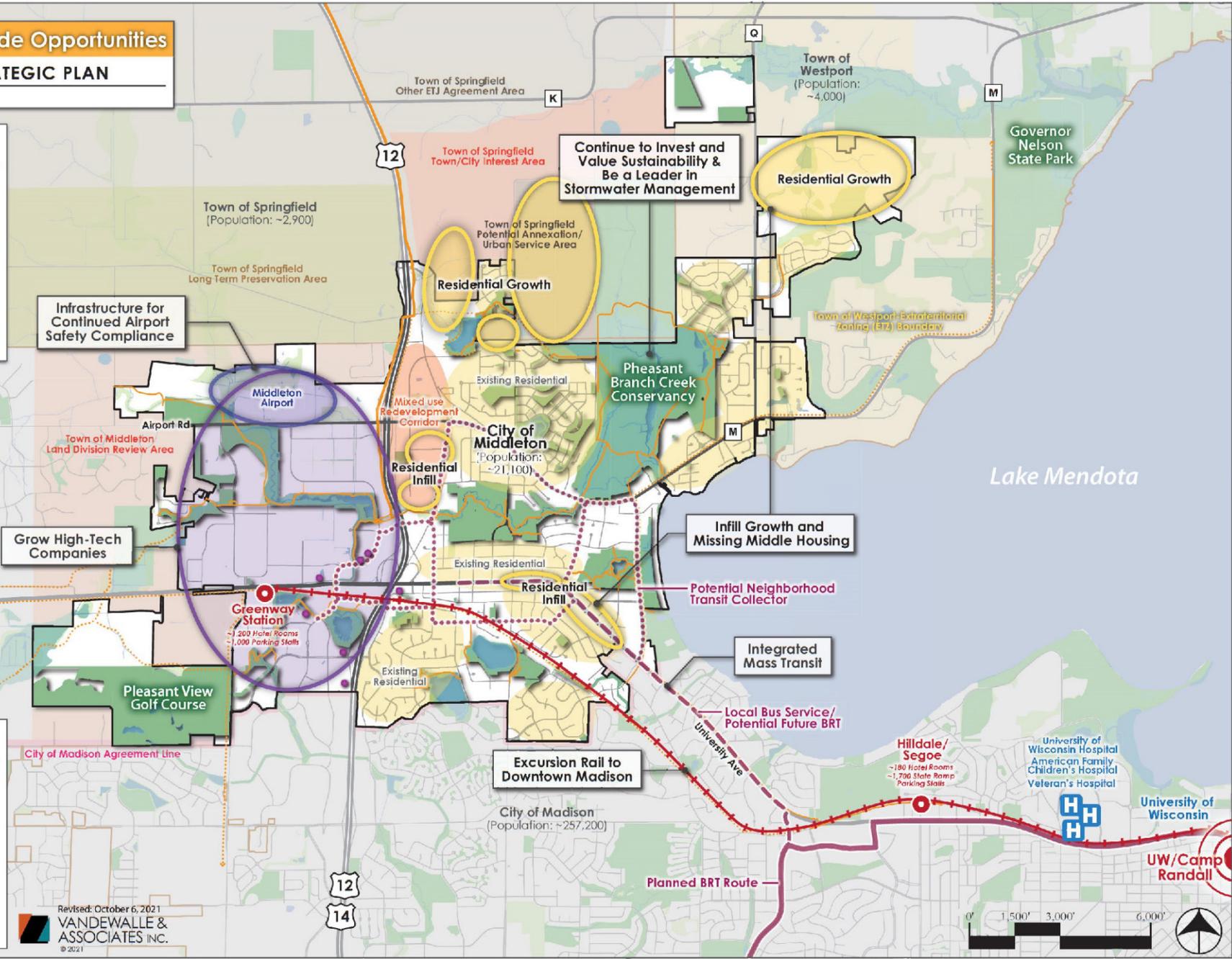
### Future Opportunities

- Excursion Rail
- Airport Safety Compliance
- Sustainability
- Stormwater Management
- Integrated Mass Transit
- Infill & Missing Middle Housing
- Grow High-Tech Companies
- Inclusion and Diversity

### Legend

- Recreation/Publicly Owned Land
- Wetland
- Environmental Corridor
- Open Water
- Existing Off-Street Path
- Planned Off-Street Path
- City of Middleton
- Other Municipal Boundaries
- Hotels

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# THE CITY OF MIDDLETON ORGANIZATION TODAY

Consultant team members Public Administration Associates (PAA) conducted a thorough financial and operational review and conducted numerous interviews with City staff and department heads to understand the current strengths, needs, and opportunities for the City of Middleton. A detailed report is included in Appendix A; however, a summary of their findings is described below.

## Financial Review

Based upon Middleton's Comprehensive Annual Financial Report (CAFR) for the fiscal year ending December 31, 2020, the City's finances are in very good condition. Essential to Middleton's fiscal health is its solid General Fund balance, high credit rating (Aa1 Moody's Investors Service), and modest use of its borrowing capacity.

- At the end of 2020, Middleton had almost 31% unassigned fund balance as compared to its goal of 16.7% – 33.3%.
- Of Dane County peer communities, Middleton has one of the lowest tax rates at \$5.65 per \$1000 equalized valuation.
- Largest tax rate percent decrease over the past 5 years.
- End of 2020, Middleton had 19.7% of its legally available General Fund debt capacity as compared to a goal to not exceed 66.6% of its capacity.
- TID #3 is financially successful with \$545 million in increment property valuation as of 1/1/2021.
- TID #5 has \$125 million in valuation.
- On-going private investment will result in projected positive fund balance by 2026.

## Operational Review

In addition to the financial review, PAA completed interviews with City of Middleton Department Heads and key members of the management team regarding the organization. The City of Middleton is a strong organization with dedicated staff who provide taxpayers with a high-level of public service. Balancing service delivery and additional programming responsibilities with funding, resources, and staffing levels rose to the top of concerns and future needs. Additional observations are below:

- High level of service and standards.
- Staff enjoy working for the City – there is interest in remote/hybrid work models.
- Need for communication coordination of messaging when communicating with the public.
- To meet the goals of the City, Department Heads identified the need for increased or improved service or programming and related staff levels.
  - Additional positions to be considered:
    - Communication Specialist
    - Stormwater Engineer or Technician (fund from Utility)
    - PT to FT Senior Center Volunteer Manager
    - City Facilities Manager
  - Hiring challenges in competitive market are experienced across departments but particularly for public safety personnel
- Numerous committees and commissions take staff time.

## Organizational Opportunities

Based on the organizational and financial review, PAA identified a number of opportunities and recommendations for the Strategic Plan and Implementation Action Plan. These are fully described in Appendix A.

### **To increase organizational effectiveness, various strategies could be implemented.**

- Currently, the management team does not keep meeting minutes or make follow-up assignments. Timeliness and accountability for action items is inconsistent.
- Organizational silos are reducing overall organizational efficiency. These silos are reaffirmed during budget development as the process promotes competition rather than collaboration.
- Improved communication and development of trust would help move staff from a department-centric focus to an organization-centric, service-oriented focus.
- Due to lack of a strategic plan, the organization lacks objectives and non-budgetary metrics to identify action items.

### **To improve governance efficiency, the number of committees, commissions, and authorities and their functions should be reviewed.**

The City of Middleton has 31 committees, commissions, and authorities. Some of these bodies have a very limited focus. In order to reduce staff time allocated to supporting them, a consolidation should be considered, or they should convene on an ad hoc basis.

### **To improve operational efficiency, some facilities (particularly the City Hall, Pleasant View Golf Course, and Senior Center) should be studied for possible improvements or replacement in the future. This can be part of the Civic Campus Study that is being revisited.**

- The development of a Pleasant View Golf Course Master Plan should be considered to encompass current and potential golf course buildings/facilities and the future use of the lands to the north and the planned reconstruction of Pleasant View Road.
- The City Hall and Senior Center are not operationally efficient and space needs assessments of both facilities for possible renovation/replacement in the future should take place.

# INTERVIEWS AND OUTREACH

## Summary of Department Head Interviews

On June 23, 2021 the Middleton Strategic Plan consultant team held an informational stakeholder meeting with City of Middleton Department Heads to gather input on key issues for the Strategic Plan. Below is a summary of key topics and issues discussed:

- Middleton responded well to the challenges of COVID and in many ways still had a strong year. City staff adapted well to workplace changes and were able to keep service to residents at high levels while keeping employees safe. Workplace flexibility and adaptation to work-from-home where feasible was successful and valued by many employees, presenting an opportunity for these flexibilities to continue in the future.
- Investments in IT and technology have improved internal work systems and services at the City. Movement toward cloud-based systems helped the City weather COVID much easier. Improvements in technology have facilitated more public engagement as residents can now attend Council meetings virtually, etc.
- Some important efforts and projects were put on hold in 2020, which will need to be addressed in the future, including the Civic Campus Plan, University Avenue Corridor Plan, fundraising for Stone Horse Green, Airport Master Plan, some staffing and technology additions, and flood mitigation/improvements.
- Middleton is essentially a land-locked community. It is unable to grow beyond its boundaries; therefore, growth and development need to occur within the community as infill, redevelopment, and increased density.
- State-imposed levy limits restrict the City's ability to increase taxes without a referendum in order to maintain high level of services to residents and continue to provide the quality of life that Middleton is known for. Additional staffing is also needed to maintain these service levels.
- Constraints on public facilities, including City Hall, library, senior and youth center. The Pre-COVID campus needs assessment should be reconsidered.
- Changes in City Administration leadership will leave a big hole in institutional knowledge at a critical point in Middleton's history.
- Staff feel that they are able to effectively communicate with Council and other elected officials about issues, projects, and needs. Elected officials are very responsive to public input, questions, and concerns, but it can be challenging as a staffer when individual issues are raised and asked to be prioritized over other existing efforts.
- The senior center, library, parks department, and building inspection department, in particular, serve diverse constituencies. Staff can face challenges with diversity and inclusion when there are language barriers with residents, but there are resources through the police department, senior center, and library that can assist staff.

## Summary of City Council Interviews

From July 1<sup>st</sup> through July 9<sup>th</sup> the Middleton Strategic Plan consultant team held informational interviews with City of Middleton Common Council members, including the Mayor, to gather input on key issues for the Strategic Plan. Below is a summary of key topics and issues discussed:

- Middleton provides high level of services and needs to maintain that standard. However, because the City is landlocked, growth cannot occur by expanding boundaries, future growth needs to occur through infill and redevelopment.
- Maintaining roads and infrastructure is an essential City service. The City has a road inspection and maintenance plan and has been able to move through that plan while also addressing emergencies as they come up.
- The City needs to address disparities in opportunity, equity, and racial justice both within the populace and City operations.
- The City is still recovering from the 2018 flood and future flood mitigation is necessary to be more resilient as extreme weather events are inevitable.
- Issues of housing affordability and increasing the diversity of housing options need to be addressed to keep Middleton as an accessible, family-friendly community. The City needs to address the missing middle in the housing market, increasing affordability while maintaining high design and construction standards. The City would also like to see more owner-occupied options (condos), not just rental housing.
- The City needs improvements for bike, ped, and transit to make it a more accessible community that is easier to get around and doesn't require a car for every trip.
- Public safety is excellent in Middleton and a top issue for the residents, but the City is facing challenges with hiring, retention, and morale.
- Critical future staffing and administration needs and changes:
  - City Administrator (following current Administrator's retirement in 2022)
  - Need to consider a Public Information Officer position
  - Need more police officers
  - Need to keep up staff levels in general to keep service levels high; existing staff is at the maximum of what can be accomplished
- Middleton is truly the Good Neighbor City – people are friendly. However, for some residents of color there is a feeling the City is not welcoming and there can be an exclusionary attitude.
  - Its regional location gives it access to Madison and the bigger city but has a small-town feel.
- Middleton has lower taxes compared to other communities in the region and has a reputation for good government and responsible finances.
- Middleton has excellent schools that attract new residents to the community. This can be a challenge as the population grows to attend local schools, the City has to expand services.
- So far, the Common Council has been willing to state DEI values, but needs to take action and implement them.

## Summary of Vision Panels Input

From September 15<sup>th</sup> through September 23<sup>rd</sup> the Middleton Strategic Plan consultant team held a series of topic-based Vision Panels, including Local Businesses & Business Groups, Education, Underrepresented Communities, Community Influencers, Community Youth, and Seniors.

Below is a summary of themes that emerged from each Vision Panel:

### Local Businesses & Business Groups Vision Panel

- City and business community have an excellent, mutually supporting relationship.
- City is an attractive location for businesses and employees, but lack of affordable housing makes it difficult to attract service workers in particular.
- Downtown is becoming more and more vibrant – business parks need a greater mix of support businesses (e.g. coffee shop and lunch businesses).
- City staff is great to work with, but would benefit from a full time economic development professional.
- Council and committees need greater awareness of the stress and cost of the development approvals process on developers and businesses.

### Education Vision Panel

- Schools are strong and key attractor of residents to the City.
- City and school district have an excellent relationship and there are more opportunities and needs to work together along with the business community.
- The “Good Neighbor” motto is genuine – need to capitalize on that to create a larger community conversation about the value of and need for more inclusivity.
- Lack of affordable housing and transportation are deterrents to attracting families and staff.

### Seniors Vision Panel

- City is very supportive of the senior community’s needs. The senior center’s location and focal point for all resources is appreciated.
- City and Council communication could improve with a multi-platform and multi-lingual communication approach (print, online, Nextdoor, social media, etc.) and a weekly summary or “digest” of what’s happening in the City.
- Transportation system could improve by closing the gaps in the sidewalk network, shifting towards universal design, and improving the transit system to better serve transit dependent populations.
- Affordable living options close to services are needed for seniors to age in place.

### Community Youth Vision Panel

- Strong sense of community, accessible and vibrant downtown, strong school district, variety of great local businesses, parks, lakes, and variety of recreational opportunities were identified as great assets.
- City needs a central community center for youth to gather in. Very few things for teens to do in Middleton because of the lack of programs, services, facilities, and staffing.
- City could increase its communication with youth by better utilizing existing avenues such as parks, YMCA, schools, daycares, and other organizations with after school programs.
- Committees should be more representative of the community and committee appointments should not all be in the hands of one person.

### Community Influencers Vision Panel

- Middleton's small-town feel; sense of community and history; schools; diversity and unique character of the neighborhoods and houses; robust parks and natural areas; and City services were identified as great assets.
- City communications could be more streamlined.
- City does a good job at managing its finances and appreciate hiring the new HR director; however, they see that City staff is stretched thin and will need to hire more staff to continue providing the level of service it does.
- Public transportation and mobility for all is needed.
- Need for more diversity, equity, and inclusion in City government, staff, and committee members.

## Summary of Public Input

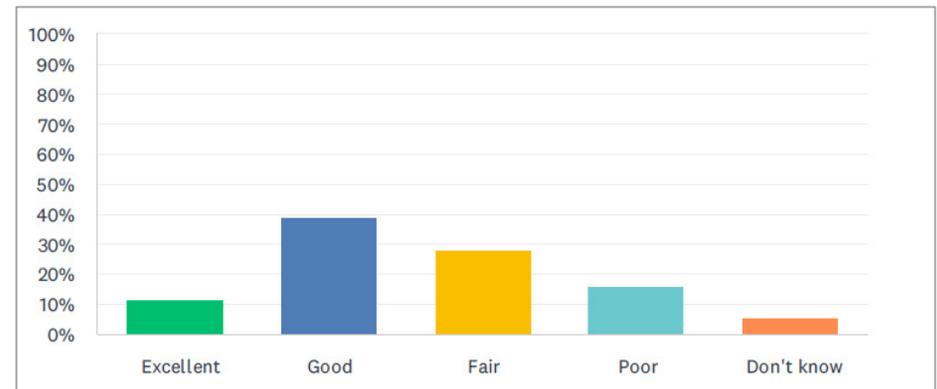
### Public Visioning Workshop

On November 4, 2021 the City and consultant team hosted a public Strategic Plan Visioning Workshop. The Workshop was held virtually and was publicly noticed. Feedback materials and recordings of the workshop were posted to the City's website to gather input from residents who were not able to attend the live virtual meeting. The workshop agenda included an overview presentation on the Strategic Plan and key findings to date, keypad polling questions and breakout discussions of key topics. Approximately 128 participants provided feedback in the Visioning Workshop (at the event and through the online materials).

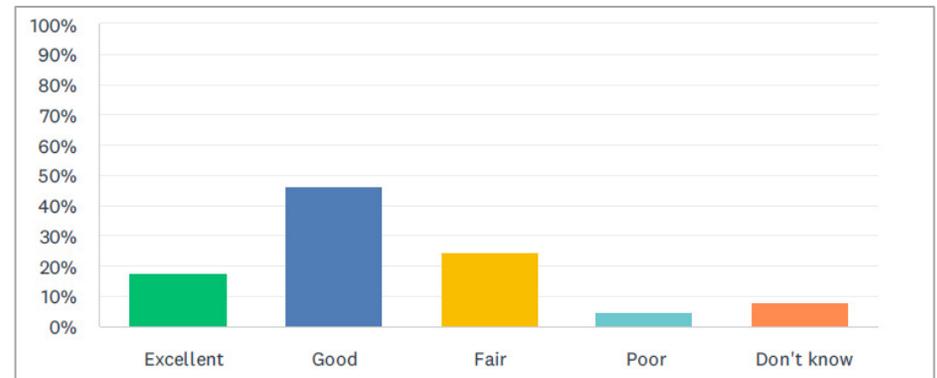
Key Takeaways from the Visioning Workshop include:

- When asked why participants live in Middleton, they cited:
  - Schools
  - Friendly community
  - Safe
  - Regional location
  - Parks and open space
- When asked what they feel optimistic about for Middleton's future, participants said:
  - Strong finances
  - Engaged public
  - High value services for the level of taxes
  - Preservation of outdoor space and natural resources
- When asked about concerns for the future, participants said:
  - Limited accessibility in multiple forms – transit, internet, availability of resources and facilities
  - Infrastructure maintenance
  - Housing affordability and growth
  - Tax levy limits and its impacts on quality of public services and community affordability

### Rate the performance of Middleton on informing residents about issues facing the community:



### Rate the performance of Middleton on the value of services for the taxes paid:



### Public Vision and Strategic Framework Meeting

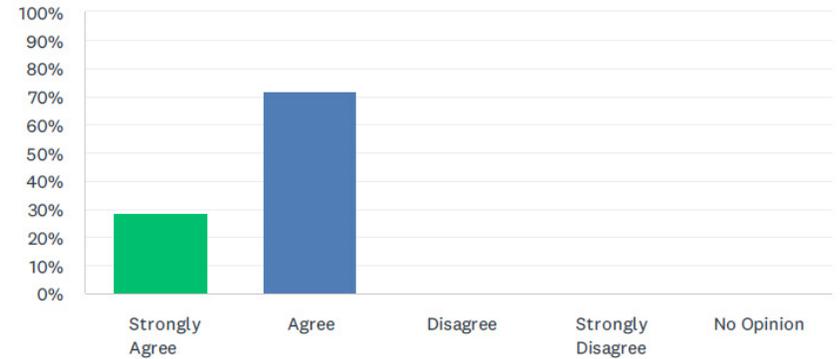
On March 16, 2022, the City and consultant team hosted a second public meeting to review the draft Vision and Strategic Framework. This meeting was held virtually and was publicly noticed. The meeting agenda included an in-depth presentation of the draft Vision Statement, Mission Statement, Core Principles, and Strategic Framework and included basic keypad polling and breakout discussions.

Key takeaways from the Vision and Strategic Framework Meeting include:

- Participants felt that the Strategic Objectives and Core Principles were the right objectives and principles to be identified and where the City should focus.
- There was discussion on multiple topics, including sustainability and technology and innovation where some participants felt the City should be identified as a leader. Others disagreed with this idea and felt that the City should focus on itself and not on how it compares to others.
- Recommendations were made across all Strategic Objectives, Vision Statement, and Mission Statement on clarifying the language and word choice and adding specificity.
- The City already communicates with residents well, but this issue is amplified because there is still a gap in understanding in the public about what the City is doing and where to get information. The City website has a lot of information, but you have to dig to find what you are looking for and it can be difficult to find older information, like meeting minutes and recordings.
- The transportation objective could be broader and more bold, particularly in how to reduce the City’s carbon footprint and should do more to emphasize regional connections.
- Need to see performance metrics included in the final Strategic Plan.
- Affordability is about keeping Middleton affordable for current residents as well as attracting new residents.

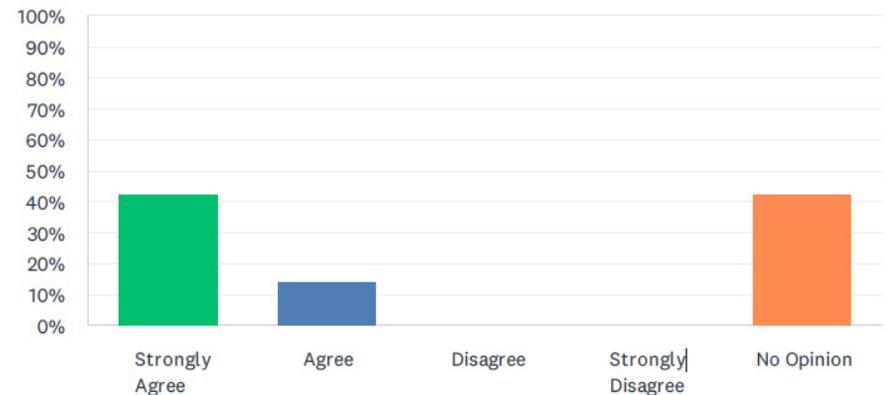
### Describe your level of agreement with the draft

**Strategic Vision Statement:** *With preserved natural beauty, a vibrant downtown, strong neighborhoods, and flourishing schools, the City of Middleton is rooted in environmental stewardship and the Good Neighbor Spirit. We are an urban, interconnected community that provides a full array of high-quality services to its residents and businesses. As a thriving, safe community, we make our parks, public facilities, and community programs accessible to all and we prioritize equity, communication, sustainability, and financial responsibility to provide an exceptional quality of life.*



### Describe your level of agreement with the draft

**Mission Statement:** *The City of Middleton provides a full array of high-quality services to its residents and businesses. City of Middleton staff and elected officials use modern technology and best practices to accomplish community goals with agility, transparency, and accountability. Middleton is committed to recruiting, supporting, and retaining a staff that reflects the diversity and values of the community.*



# DIVERSITY, EQUITY, AND INCLUSION IN MIDDLETON

## Overview

In Spring 2021, EQT By Design (EQT) engaged with Vandewalle & Associates and Public Administration Associates to design a strategic framework in which key goals are addressed to achieve the City of Middleton's vision and supplement its 2021 Comprehensive Plan. The City of Middleton's current mission and community values include the prioritization of providing equitable opportunities for all people and celebrating diversity, which was at the center of EQT's efforts.

EQT's framework design for creating equity-centered recommendations was based on listening sessions with the City of Middleton's department heads, council members, and other key community stakeholders across the City (Underrepresented Vision Panel). More specifically, EQT:

- Developed equity surveys for both council members and department heads centered around their knowledge, skills, and experience with equity, anti-racism, and inclusion (Summer 2021).
- Facilitated a focus group with Middleton department heads to expand on the initial equity survey findings (Summer 2021).
- Led the Underrepresented Vision panel engagement series, which included both group and one-on-one feedback sessions (Summer - Fall 2021).

In conducting these engagements, EQT aimed to identify community truths, accomplishments, strengths, and opportunity areas to inform the recommendations of the Strategic framework.

## Data & Key Findings

As a result of these engagements and survey analysis, EQT identified several key considerations and findings relating to the City's equity journey and relationship to DEI. The results of the council member and department head surveys as well as Underrepresented Vision Panel engagement can be accessed in Appendix B.

## Closing Reflections

The City of Middleton Strategic Plan provides recommendations and considerations for accomplishing vision goals and supplements the Comprehensive Plan. While plans must align with City resources, an equity core principle must remain in focus while directing the City's strategic objectives.

The City of Middleton's department heads, council, and community members have clearly and explicitly identified DEI as a key priority. Intentional, strategic action is required to ensure a transparent City-wide strategy is developed to address equity, anti-racism, and inclusion. With equity at its core, the City of Middleton can continue to build its capacity to be the best neighborhood city for all.

# COMPREHENSIVE PLAN (2021)

The City of Middleton Comprehensive Plan 2021 was completed in the months prior to the kick-off of the Strategic Plan planning process. The Comprehensive Plan included an extensive public input and participation process and is an accurate reflection of the City's goals, values, and priorities. The Comprehensive Plan provides the City's roadmap for land use and physical planning and setting policy and priorities for housing, transportation, and facilities. The Strategic Plan looks to build on the Comprehensive Plan, not replace it, and takes a more detailed look at the City of Middleton's organizational future and allocation of resources.

The development of the Strategic Plan's Vision and Strategic Framework was informed by the 2021 Comprehensive Plan Vision and Community Values, which are outlined on page 4 of the [Comprehensive Plan](#). While these two plans have different vision statements due to the different intentions and purposes for the plans, they are intended to be complementary not contradictory. The Strategic Plan builds from the Comprehensive Plan vision to home in on the organizational future of Middleton, while the Comprehensive Plan is meant to address the community at large.

## City of Middleton Comprehensive Plan (2021)

### Vision Statement:

The City of Middleton is a sustainable, urban community with an exceptional quality of life that is rooted in environmental stewardship. We are a thriving and safe community accessible to all, and we celebrate diversity and equitable opportunities for all people.

## COMMUNITY VALUES

*As the Good Neighbor City, Middleton embraces...*

<b>Community</b>	We are a welcoming, inclusive city with a distinct identity, anchored by a vibrant downtown, unique neighborhoods, and our people.
<b>Sustainability</b>	We meet the needs of the present without compromising the ability of future generations to meet their own needs.
<b>Equity</b>	We celebrate diversity and strive for fair and just opportunities and outcomes for all people.
<b>Health</b>	We focus on the well-being of people and the environment.
<b>Accessibility</b>	We embrace full participation by all members of our community.
<b>Innovation</b>	We collaborate with individuals, businesses, and organizations to embrace new ideas that will foster strong economic growth.
<b>Resiliency</b>	We aspire to be a community that is capable of withstanding and recovering from adverse situations.

# VISION

The Middleton Strategic Plan is grounded in a future-oriented vision and framework that outlines key areas of focus for the City government as an organization and the community as a whole. Building on the strong foundation of the Comprehensive Plan and extensive input from City staff and elected officials, the Strategic Plan Advisory Committee and Vision Panels, and the general public, the following Vision and Strategic Framework was developed. The different framework elements are described below.

The Strategic Plan Vision Statement represents the broadest aspiration for Middleton as a community. It has a long-term outlook and was crafted to complement, not duplicate the vision laid out in the 2021 Comprehensive Plan.

## Mission

The Mission Statement outlines the values and purpose for the Middleton government. It serves as a guide to the City organization, specifically its staff and elected officials, in its priorities as an employer and a public service provider. These priorities will organize the City to achieve the Strategic Plan Vision.

## Core Principles

The Strategic Framework includes four Core Principles. These are core ideals that the City of Middleton is committed to practicing and incorporating into all areas of the City as an organization and a community. The Core Principles are embedded in each of the Strategic Objectives and align all recommendations in the Implementation Action Plan with the Strategic Plan Vision and priorities.

## Strategic Plan Structure



The four Core Principles are:



### Long-Term Financial & Operational Stability

Investments of City of Middleton time, resources, and funds advance long-term financial and operational sustainability and keep Middleton a financially successful community.



### Equity Centered Environment

Middleton programs and processes to create an environment that addresses racial inequality and supports all City residents to thrive in Middleton.



### Communication & Engagement

Expanded dialogue with City residents, businesses, and partners efficiently communicates the City's decisions, actions, and needs and increases access to opportunities to participate in City decision-making.



### Sustainability & Resiliency

The City of Middleton uses proactive strategies and practices to meet emerging future needs across all sectors of the community and endure future disruptions to our climate, ecological, and social systems.

## Strategic Framework

The Strategic Framework identifies key areas of focus to achieve the vision. These six Strategic Objectives bring together the Vision, Mission, and Core Principles to provide a foundation for the development of recommendations and actions for implementation of the Strategic Plan. These objectives are major themes throughout the Plan.



# MIDDLETON STRATEGIC PLAN VISION

## MISSION

The City of Middleton provides a full array of high-quality services to its residents and businesses. City of Middleton staff and elected officials use modern technology and best practices to accomplish community goals with agility, transparency, and accountability. Middleton is committed to recruiting, supporting, and retaining a staff that reflects the diversity and values of the community.

### LONG-TERM FINANCIAL & OPERATIONAL STABILITY

Investments of City of Middleton time, resources, and funds advance long-term financial and operational sustainability and keep Middleton a financially successful community.



### COMMUNICATION & ENGAGEMENT

Expanded dialogue with City residents, businesses, and partners efficiently communicates the City's decisions, actions, and needs and increases access to opportunities to participate in City decision-making.



### VISION:

With preserved natural beauty, a vibrant downtown, strong neighborhoods, and flourishing schools, the City of Middleton is rooted in environmental stewardship and the Good Neighbor Spirit. We are an urban, interconnected community that provides a full array of high-quality services to its residents and businesses. As a thriving, safe community, we make our parks, public facilities, and community programs accessible to all and we prioritize equity, communication, sustainability, and financial responsibility to provide an exceptional quality of life.

### EQUITY-CENTERED ENVIRONMENT

Equity-centered decision-making structures and considerations are incorporated into critical Middleton programs and processes to create an environment that addresses racial inequality and supports all city residents to thrive in Middleton.



### SUSTAINABILITY & RESILIENCY

The City of Middleton uses proactive strategies and practices to meet emerging future needs across all sectors of the community and endure future disruptions to our climate, ecological, and social systems.



## STRATEGIC OBJECTIVES

### Affordability & Livability



Employ all available tools to make Middleton a community that is affordable and accessible to all community members.

### Business Development



Strengthen connections to the Middleton business community to support a diverse economy of large and small businesses that have the facilities, resources, and workforce necessary to innovate and grow.

### Transportation, Infrastructure & Technology



Develop a diversity of partnerships and innovative financial strategies to maintain a highly functional, multi-faceted transportation system of roads, interchanges, transit, and bicycle and pedestrian infrastructure.

### Recreation and Wellness



Grow opportunities for Middleton residents and employees to lead healthy, active lives through recreational facilities, programs, and open spaces that are accessible to all.

### Public Safety and Emergency Management



Ensure that Middleton is prepared and protected for emergency events, including extreme weather, public health crisis, and first responders, through appropriate investments in resources, staff, training, and partnerships.

### City Organizational & Community Development



Build City- and community-based structures, systems, and institutions that promote strong relationships, advance diversity, equity, and inclusion, and help Middleton live its core principals.

# IMPLEMENTATION ACTION PLAN

## How to use this Plan

The Strategic Plan's Implementation Action Plan provides the City of Middleton with strategic, actionable steps to advance the Strategic Plan Vision and Mission. In using this Plan, it's critical to note that these are the top priorities developed through the planning process. In addition to what is included here, each department has a large number of other, vitally important, often daily occurring responsibilities. Further, the City has adopted more than 20 other plans addressing a wide range of operations and policies (see Appendix C). **Accordingly, this Implementation Action Plan is not intended to be an operational plan for each department but rather a focused list of new or ongoing activities that are essential for advancing the Vision, Mission, Core Principles, and Strategic Objectives.** Accomplishing these will require new or diverted resources, so the Plan is expected to be a key driver in preparing the annual operating budget and capital improvements plan.

The City Council is further asked to identify 3-5 action items or priorities from this Plan that City Staff will focus on in any given year. The other action items, while important, will be prioritized below the items selected by the Council each year. This is so that time, resources, and efforts may be properly focused on being exceptional in a defined number of areas each year, rather than attempting to simultaneously address every item with limited resources.

While the Vision, Mission, and Core Values use a 10- to 20-year lens on the future, the Implementation Action Plan is focused on activities to be carried out over the next five years. The timeframes provided in the Implementation Action Plan are meant as an estimate of how long it will take to address an action item based on staff and resource availability. These timeframes provide a guideline for organizing the strategic priorities within the City's organizational constraints. As a living document, it is expected that the Implementation Action Plan will be updated annually as projects are completed and new ones are added. Further, the entire Strategic Plan should be reviewed and revised as needed every five years.

Just as creating this Plan took time to educate the participants, evaluate ideas, and determine priorities, with adjustments to the process being made along the way, so too will implementing the Plan. As the City's first strategic plan, there has been and continues to be a learning process of how to use it most effectively. For instance, the planning process revealed that detailed baseline data is not available for many functions. Further, uncertainty remains in how many new or expanded activities can be undertaken by departments and budgets that already are stretched thin. As a result, **the Implementation Action Plan is a guide and not a directive.** Many of the items listed in this Plan cannot reasonably be accomplished without a shift or increase in resources, time, or funding. As experience with the Plan is gained by the departments, Council, committees, and the public, future updates should become easier to prepare with increasing levels of confidence of what can realistically be achieved. *No prioritization or preference is intended by ordering of Strategic Objectives or Goals.*

## Implementation Action Plan Organization

Each recommended action item includes the following key information:

**Goal:** Organizes the recommendations around a specific goal within the Strategic Objective.

**Department:** Identifies the City department responsible for accomplishing or advancing the recommended action. Where multiple departments are identified, the first one listed is expected to take the lead.

**Recommended Action:** Actionable step to accomplish the stated goal and Strategic Plan Vision.

**Commissions/Committees:** Identifies the City Commission or Committee that can assist in the oversight and implementation of the recommended action. Where multiple committees are identified, the first one listed is expected to take the lead.

**Partners:** Identifies potential partners outside of the City organization that can help accomplish the recommended action.

**Core Principles:** Indicates the Core Principles the recommended action will help achieve.



Long-Term Financial & Operational Stability



Equity Centered Environment



Communication & Engagement



Sustainability & Resiliency

**Timeline:** Estimate of how long it will take to address an action item based on staff and resource availability.

**Metrics and Outcomes** Recommended data points for measuring progress or completion of an action item.



# AFFORDABILITY & LIVABILITY

## Vision:

*Employ all available tools to make Middleton a community that is affordable and accessible to all community members.*

## Key Observations/Considerations:

- Middleton is a highly desirable community but cost of living, particularly housing, is a barrier to living in the community. Safety, Middleton's "small town feel," open spaces, and friendly neighbors are seen as key community assets.
- Underrepresented Vision Panel participants are concerned about having to move out of Middleton due to increased housing costs in search of more affordable housing options in surrounding areas.
- Underrepresented Vision Panel participants feel there is a City narrative that affordability for BIPOC community members is equivalent to low-income housing - "I'm not speaking to the fact of low-income housing. It's more about making Middleton worth staying."
- Some families come to Middleton for the schools and struggle to find affordable housing.
- Keeping taxes and expenses low is important to maintaining affordability for residents who own their homes, particularly seniors.
- There is a desire for accessible homeownership opportunities as well as rental.
- There are opportunities for creative partnerships between the public and private sector to accomplish the City's affordability and sustainability goals.

## Value to Residents:

- Keeping Middleton affordable is critical to making the community accessible and inclusive.
- Middleton residents value the small town, community-oriented character which is preserved by the diversity of residents, housing options, and the accessibility of amenities.
- Affordability and accessibility are important for attracting and retaining new and existing residents.

## Reflection Questions:

- How can the City prioritize ample green / outdoor space - along with the other identified community assets - within affordable housing units?
- How can the City leverage key community influencers to reach and meaningfully engage underrepresented community members?
- Are there other cities within and outside of the United States that can serve as a model for the City's efforts? Are there co-learning opportunities?
- How does the City plan to meaningfully engage underrepresented community members in the development and implementation of this strategic objective? How does the City make this engagement sustainable?
- How can the City maintain its comparatively low property tax rate while continuing to provide its relatively high level of municipal services?

## Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Engage private and public partners to increase the number of affordable rental and for sale housing units.</b>						
Administration	Implement, monitor and continually update the Affordable Homeownership Strategy	Workforce Housing Com.	Housing Developers	 	Ongoing	<ul style="list-style-type: none"> <li>Number of recommendations implemented</li> </ul>
Planning & Community Development	Update zoning regulations to reduce barriers to new housing and increase appropriate infill densities	Plan Com.	Zoning Code Consultant	 	Ongoing	<ul style="list-style-type: none"> <li>Reduced regulations and increased residential development options</li> </ul>
Planning & Community Development	Encourage and seek the use of state and federal affordable housing tax credit and grant programs	Workforce Housing Com.	Housing Developers		Ongoing	<ul style="list-style-type: none"> <li>Amount of funding secured</li> <li>Number of affordable units created</li> </ul>
Administration	Evaluate extension of TID #3 to create an affordable housing fund	Com. Dev. Auth. Workforce Housing Com.		 	3-5 years	<ul style="list-style-type: none"> <li>TID extended</li> <li>Amount of funds generated</li> </ul>
Planning & Community Development	Develop an initiative to engage BIPOC neighborhoods in City housing development and redevelopment efforts, including vision and strategy feedback	Workforce Housing Com. Plan Com.	Housing Developers; Neighborhood Organizations; Community Influencers	 	1-3 years	<ul style="list-style-type: none"> <li>Number of engagement events</li> <li>Number of participants</li> </ul>
Planning & Community Development	Engage in an open forum with underrepresented community members for non-low income affordable housing options	Workforce Housing Com.		 	1-3 years	<ul style="list-style-type: none"> <li>Number of forums held</li> <li>Number of participants</li> </ul>
Planning & Community Development	Intentionally explore and implement affordable housing options for underrepresented community members that do not center on low-income/subsidized housing	Workforce Housing Com.	Housing Developers	 	3-5 years	<ul style="list-style-type: none"> <li>Number of units created</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 2: Maintain affordable property tax rate while continuing to provide high quality services</b>						
Administration	Pursue modest referendum (< \$1 M) to fund positions identified in this plan as needed to maintain high quality services	City Council			2022	<ul style="list-style-type: none"> <li>Referendum approved</li> <li>Amount of funds available</li> </ul>
Administration	Continue to evaluate optimal staffing levels and needs	Finance Com.	Dane County City Village Assoc.		Ongoing	<ul style="list-style-type: none"> <li>Annual turnover percentage</li> <li>Employee Climate Survey</li> </ul>
Administration Public Works	Prioritize and implement remaining capital improvements in TID #3, based on funding availability	Public Works Com.			Ongoing	<ul style="list-style-type: none"> <li>Projects completed</li> </ul>
Administration	Evaluate potential for final subtraction of property from TID #3 to increase operating revenues	Finance Com.	Joint Review Board		1-3 years	<ul style="list-style-type: none"> <li>Value subtracted</li> <li>Increase in levy</li> <li>Reduction in tax rate</li> </ul>
Administration Planning & Community Development	Update Growth Boundary Agreements with surrounding communities to preserve the ability to grow sustainably	Plan Com.		 	3-5 years	<ul style="list-style-type: none"> <li>Updates to agreements</li> </ul>
Administration	Evaluate and plan for impacts of TID #3 closure on levy and tax rates	Finance Com.		 	3-5 years	<ul style="list-style-type: none"> <li>Increase in levy</li> <li>Reduction in tax rate</li> </ul>
Administration	Create a part-time Human Resources Generalist position	Personnel Com. Finance Com.			3-5 years	<ul style="list-style-type: none"> <li>Creation of Position</li> <li>Employee Climate Survey</li> </ul>
<b>Goal 3: Expand sustainability initiatives to create a carbon neutral community by 2050.</b>						
Planning & Community Development	Implement the Middleton Sustainable City Plan	Sustainability Com.	Dane County Office of Energy & Climate Change; WI Climate Cities	  	Ongoing	<ul style="list-style-type: none"> <li>Recommendations implemented</li> <li>Carbon emissions reduced</li> <li>Energy saved</li> <li>Water saved</li> </ul>
Planning & Community Development	Explore opportunities for regional collaboration on sustainability, resiliency, and natural resource management	Sustainability Com.	MG&E; Businesses; Nonprofits; Other Gov's	 	Ongoing	<ul style="list-style-type: none"> <li>See Sustainability Plan for Metrics</li> </ul>



Long-Term Financial & Operational Stability



Equity Centered Environment



Communication & Engagement



Sustainability & Resiliency

# TRANSPORTATION, INFRASTRUCTURE & TECHNOLOGY



## Vision:

*Develop a diversity of partnerships and innovative financial strategies to maintain a highly functional, multi-faceted transportation system of roads, interchanges, transit, and bicycle and pedestrian infrastructure.*

## Key Observations/Considerations:

- There is a demand for improved transit service in Middleton, but there are challenges in connecting with the regional transit provider.
- Residents who may live in the outlying areas and not in the City center do not have access to grocery stores or other amenities via public transportation.
- There is a need for increased funding to support City transportation needs, in addition to an increased presence in BIPOC communities and neighborhoods.
- Maintaining the quality of the infrastructure system is critical to the quality of life in Middleton and is an essential service provided by the City.
- Improvements in technology and lower vehicle cost of electric vehicles make improvements more accessible.
- The City needs a safe and well-connected network of bicycle and pedestrian infrastructure, including off-street paths, trails, bike lanes, and sidewalks.
- Middleton public facilities, including City Hall, library, and potential community buildings, need to be reviewed to best serve residents.
- Some residents face barriers in accessing City services and facilities due to location and transit access.
- Rating of pavement surface (PASER) is an important criterion for prioritizing projects in developing 5-Year Capital Improvement Program.
- Investments in targeted technology can improve efficiency in City services and improve cyber-security.
- A software platform can assist the City in tracking and timely reporting on status of action items to decision makers and residents.

## Value to Residents:

- Improvements in infrastructure, facilities, and technology will expand access to community amenities and destinations.
- Improved transportation and infrastructure will increase connectivity and the sense of community citywide.

## Reflection Questions:

- How can the City update current transportation assessment practices and processes to include City-wide examination of the existing inequities?
- How does the City plan to meaningfully engage underrepresented community members in the development and implementation of this strategic objective?
- How can the City more cost effectively manage its facilities and their on-going maintenance and needed improvements?

## Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Increase transit service and mobility options to the region and within the City.</b>						
Planning & Community Development	Promote incorporation of transit and other transportation modes directly into new development to extent feasible	Plan Com.	Private Developers	  	Ongoing	<ul style="list-style-type: none"> <li>Number of projects</li> </ul>
Planning & Community Development	Routinely conduct stakeholder engagement & user needs assessments to fully understand transit barriers (every 2-3 years)	Ped., Bike & Trans. Com.	City of Madison Metro	  	2-3 years	<ul style="list-style-type: none"> <li>Number of engagement events</li> <li>Number of participants</li> <li>Number of recommendations implemented</li> </ul>
Administration	Evaluate potential need for circulator service and identify funding sources	Ped., Bike & Trans. Com.	City of Madison Metro	 	3-5 years	<ul style="list-style-type: none"> <li>Amount of funding procured</li> </ul>
Planning & Community Development	Develop research practices to understand what new mobility solutions may be warranted	Ped., Bike & Trans. Com.			3-5 years	<ul style="list-style-type: none"> <li>Newly identified research practices and partnerships</li> </ul>
Planning & Community Development	Implement new mobility solutions with transportation options that enable people with visual, hearing, cognitive, and mobility disabilities	Ped., Bike & Trans. Com.	See Transit Partner List		3-5 years	<ul style="list-style-type: none"> <li>Accessibility Street Assessment</li> </ul>
<b>Goal 2: Increase walkability and use of bicycles.</b>						
Public Works	Continue to build a connected network of sidewalks and on- and off-street paths	Ped., Bike & Trans. Com.	Dane County MPO		Ongoing	<ul style="list-style-type: none"> <li>Length of sidewalk added</li> <li>Length of bike/multi-use path added</li> <li>Number of ped/bike injuries &amp; crashes</li> <li>Prioritized network connection list</li> </ul>
Planning & Community Development	Promote mixed-use development, including both mixed-use projects and buildings, to serve the needs of residents within walking distance	Plan Com.	Private Developers	 	Ongoing	<ul style="list-style-type: none"> <li>Number of projects</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 3: Enhance sustainability and cost-effectiveness of public facility and infrastructure improvements.</b>						
Public Works	Create a dedicated stormwater management position as funding is available	Finance Com.		 	2-3 years	<ul style="list-style-type: none"> <li>Position created and filled</li> </ul>
Planning & Community Development	Plan for public and private electric vehicle infrastructure	Plan Com. Public Works Com. Sustainability Com.	Private Developers	 	1-2 years	<ul style="list-style-type: none"> <li>Number of charging stations added</li> </ul>
Administration	Invest in municipal fleet electrification	Finance	PSC	 	1-2 years	<ul style="list-style-type: none"> <li>Number of electric vehicles</li> </ul>
Administration	Apply for federal grants to construct public vehicle electrification infrastructure	Finance	Federal and State Agencies	 	1-2 years	<ul style="list-style-type: none"> <li>Funds procured</li> <li>Number of charging stations purchased</li> </ul>
Planning & Community Development	Incorporate renewable energy, energy efficiency, and energy storage technology in public facilities	Building Com. Sustainability Com.	MG&E PSC	 	Ongoing	<ul style="list-style-type: none"> <li>Number of installations</li> <li>Energy saved</li> </ul>
Planning & Community Development Administration	Utilize universal design in renovated and new public facilities	Building Com.		 	Ongoing	<ul style="list-style-type: none"> <li>Number of accessibility improvements</li> </ul>
<b>Goal 4: Ensure capital improvements are distributed equitably throughout the community.</b>						
Public Works	Engage underrepresented communities in determining needed capital improvements	Public Works Com.		 	3-5 years	<ul style="list-style-type: none"> <li>Number of engagement events</li> <li>Number of participants</li> <li>Number of recommendations implemented</li> </ul>
Administration Public Works	Ensure capital improvement planning and funding considers equity	Finance Com. Public Works Com.		 	3-5 years	<ul style="list-style-type: none"> <li>Inclusion of equity measures in CIP process (geographic distribution of CIP improvements, etc.)</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 5: Prepare Civic Campus master plan to include City Hall, Library, and Senior Center.</b>						
Administration Library Senior Services	Revisit and revise Civic Campus plan in post-COVID environment	Building Com. Library Board Com. On Aging		 	3-5 years	<ul style="list-style-type: none"> <li>Plan Completed and Adopted</li> </ul>
Administration	Review the addition of a full time Facilities Manager position.	Building Com.			3-5 years	<ul style="list-style-type: none"> <li>Position created and filled</li> </ul>
<b>Goal 6: Use technology to improve efficiency and cost-effectiveness of City services.</b>						
Administration	Develop comprehensive technology plan for all City operations	City Council			3-5 years	<ul style="list-style-type: none"> <li>Completion of plan</li> <li>Recommendations implemented</li> </ul>



Long-Term Financial & Operational Stability



Equity Centered Environment



Communication & Engagement



Sustainability & Resiliency



# BUSINESS DEVELOPMENT

## Vision:

*Strengthen connections to the Middleton business community to support a diverse economy of large and small businesses that have the facilities, resources, and workforce necessary to innovate and grow.*

## Key Observations/Considerations:

- Special events and programming are critical to promoting downtown as a destination and diversifying the tourism experience in Middleton.
- BIPOC-owned businesses don't have access to or see the value of local chambers of commerce, micro-incubators, and mentorship.
- City has a strong relationship with the business community and was very responsive during the COVID-19 pandemic in supporting local businesses.
- There is a lack of awareness among residents about the employers in the community, particularly among youth and students.
- There are many opportunities for creative partnerships between the public and private sector to advance the City's economic and workforce goals.
- The City is an attractive location for businesses and employees, but the lack of affordable housing makes it difficult to attract service workers in particular.
- City Council and committees need greater awareness of the stress and cost of the development approvals process on developers and businesses, including in the City's industrial and business parks.
- Existing partnerships between area schools and employers are important for workforce development and can be expanded.

## Value to Residents:

- Increased customer traffic to downtown will improve the economic health of existing businesses and increase interest and demand for new businesses.
- Increased BIPOC entrepreneurship increases financial stability across the community.
- Greater collaboration between the public and private sector regarding workforce development will expand employment opportunities for Middleton students and encourage greater youth retention.

## Reflection Questions:

- How can Tax Increment Financing (TIF) be strategically used in the future to assist with community business development efforts?
- How will enhancements to existing public lands, recreation, and forestry functions of the City and possible new additions create new enthusiasm for local tourism?
- What existing relationships can the City leverage (both within and outside of the City) to strengthen relationships with BIPOC chambers?
- What types of assessment tools are needed to create a low-risk business environment?
- How does the City plan to meaningfully engage underrepresented community members in the development and implementation of this strategic objective?

## Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Modernize Middleton's business parks to retain and attract employers and workforce.</b>						
Planning & Community Development	Encourage turning surface parking lots into more useable spaces, where possible look for structured parking solutions to parking needs	Plan Com.	Area Businesses	 	Ongoing	<ul style="list-style-type: none"> <li>Number of structured parking spaces</li> <li>Number of surface spaces removed</li> </ul>
Planning & Community Development	Grow and attract technology and innovation businesses that bring high-quality jobs to the community	Plan Com.	Chamber of Com.; MadRep; WEDC		Ongoing	<ul style="list-style-type: none"> <li>Number of new businesses</li> </ul>
Planning & Community Development	Develop sustainable development and renewable energy standards specifically for business parks	Plan Com. Sustainability Com.	Area Businesses; MG&E	 	3-5 years	<ul style="list-style-type: none"> <li>Standards adopted</li> </ul>
Planning & Community Development	Update the branding and image of Middleton's business parks to attract new businesses/tenants		Chamber of Com.		3-5 years	<ul style="list-style-type: none"> <li>Brand developed</li> <li>Number of new businesses</li> </ul>
Planning & Community Development	Work with partners to support the development of a business incubator targeted to Middleton's key industries		Area Businesses; Chamber of Com.; WEDC		3-5 years	<ul style="list-style-type: none"> <li>Incubator created</li> <li>Businesses incubated</li> </ul>
<b>Goal 2: Work with partners to introduce Middleton youth to local employment and career opportunities.</b>						
Public Lands, Recreation, & Forestry	Increase community awareness of Middleton employers and career/mentorship opportunities	Com. on Youth	Area Businesses; School District; Madison College; Chamber of Com.	 	3-5 years	<ul style="list-style-type: none"> <li>Number of programs developed</li> <li>Number of program participants</li> </ul>
Public Lands, Recreation, & Forestry	Create a Teens to Careers pipeline with local businesses	Com. on Youth	Area Businesses; School District; Madison College; Chamber of Com.	 	3-5 years	<ul style="list-style-type: none"> <li>Number of businesses</li> <li>Number of students</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 3: Work with partners to promote greater opportunities for small and BIPOC, and women-owned businesses.</b>						
Planning & Community Development	Support the creation and distribution of multilingual and multicultural business development resources that are accessible through several diverse mediums (e.g. virtual, in-person information sessions, text and video information)		Chamber of Commerce; DT Bus. Assoc.; Latino Chamber; Black Chamber; UW SBDC	 	Ongoing	<ul style="list-style-type: none"> <li>New resources created</li> </ul>
Administration	Develop and implement equitable City procurement protocols to support vendor diversification	Finance Com.	Area Businesses	 	1-2 years	<ul style="list-style-type: none"> <li>Policy adopted</li> <li>Number of new vendors</li> <li>Number of DBE vendors</li> </ul>
Planning & Community Development	Support and encourage strategies to increase racial and socio-economic diversity of Middleton business owners, including incubators, co-working space, office rental support, commercial kitchen facilities, and partnership and mentorship opportunities		Chamber of Com.; D'town Bus. Ass.; Latino Chamber of Dane County; Madison Black Chamber of Commerce; UW Small Business Development Center	 	3-5 years	<ul style="list-style-type: none"> <li>Number of programs developed</li> <li>Number of participants in programs</li> <li>Number of new small and BIPOC businesses</li> <li>Dollar amount annually awarded to BIPOC, DBE or small businesses</li> </ul>
Planning & Community Development	Evaluate expansion of City business assistance programs similar to those provided for COVID and flooding	Finance Com.	Chamber of Com.; D'town Bus. Ass.		3-5 years	<ul style="list-style-type: none"> <li>Number of businesses assisted</li> </ul>
<b>Goal 4: Maintain and expand a variety of dynamic business districts.</b>						
Administration	Continue the strategic use of TIF to promote the City's business development goals	Com. Dev. Auth.	Businesses	  	Ongoing	<ul style="list-style-type: none"> <li>Number of TIF deals</li> <li>Amount of private investment</li> </ul>
Planning & Community Development	Program the use of Stone Horse Green	Com. Dev. Auth.			2022	<ul style="list-style-type: none"> <li>Programs and events held</li> <li>Program attendance</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
Planning & Community Development	Implement University Avenue Plan	Plan Com.	Private and non-profit developers		Ongoing	<ul style="list-style-type: none"> <li>Number of recommendations completed</li> <li>Number of new projects created</li> <li>Amount of investment</li> </ul>
<b>Goal 5: Continue to expand and diversify tourism opportunities in Middleton by building on the City's assets, culture, and regional position.</b>						
Tourism	Continue to support the Cross-Country Ski complex to establish Middleton as a world class destination for year-round activity and recreation	Tourism Com.	CXC Foundation; Wisconsin Department of Tourism		Ongoing	<ul style="list-style-type: none"> <li>Number of visitors attracted</li> <li>Number of events</li> </ul>
Tourism	Continue to promote downtown as a destination	Tourism Com. Com. Dev. Auth.	D'town Bus. Ass.; Chamber of Com.		Ongoing	<ul style="list-style-type: none"> <li>Number of visitors attracted</li> </ul>
Tourism	Continue to utilize Middleton's commitment to open space and conservancy areas to promote green tourism opportunities	Tourism Com. Conservancy Lands Com. Sustainability Com.	Wisconsin Department of Tourism	 	Ongoing	<ul style="list-style-type: none"> <li>Number of visitors attracted</li> </ul>
Tourism	Continue to support and attract signature events that put Middleton on the map	Tourism Com. Com. Dev. Auth.	D'town Bus. Ass.; Chamber of Com.		Ongoing	<ul style="list-style-type: none"> <li>Number of events</li> <li>Number of visitors attracted</li> <li>Number of increased room nights</li> </ul>
Tourism	Evaluate cost-effectiveness of moving some contracted services in-house	Tourism Com.			3-5 years	<ul style="list-style-type: none"> <li>Dollars saved</li> <li>Additional staff hours gained</li> </ul>
Tourism Administration Public Lands, Recreation & Forestry	Coordinate with other City departments in their planning of enhanced and new facilities to evaluate potential for use in attracting new events and visitors	Finance Committee Parks, Rec. & For. Com. Tourism Com.			3-5 years	<ul style="list-style-type: none"> <li>New venues created</li> <li>New events attracted</li> </ul>



Long-Term Financial & Operational Stability



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# RECREATION & WELLNESS

## Vision:

*Grow opportunities for Middleton residents and employees to lead healthy, active lives through recreational facilities, programs, and open spaces that are accessible to all.*

## Key Observations/Considerations:

- Demand by Middleton residents for increased activity and programming at the Senior Center and Public Library cannot be met at the current facilities. The future Civic Campus should include recreation and wellness programs.
- Underrepresented Vision Panel parents are unfamiliar with the City resources that exist for teen summer/school break programming.
- The majority of Underrepresented Vision Panel participants mentioned learning more about available resources in Middleton requires extensive research from residents (i.e. no one-stop-shop available to the general public).
- City recreation programs represent one of the few affordable options for youth sports, activities, and clubs in the area, however, high demand and limited capacity makes them difficult to access.
- Accessibility to services is difficult for residents who can't drive, which means people have to rely on volunteers from senior center. Transit system could be improved to better connect people to services.
- Activities provided by the City should go beyond youth sports and include passive, nature-based recreation and programs for the arts and multicultural development.
- The Golf Course is very successful, is one of the best courses in Dane County and is financially strong.
- The Pheasant Branch Conservancy is a regional asset and a natural amenity that distinguishes Middleton from other communities. The City's commitment to conservation and its natural resources is a key community value.
- More programs and facilities are needed for teens.

## Value to Residents:

- Residents would benefit from increased facility space including recreation and wellness programming areas at Senior Center and Library.
- Teens and parents do not need to seek teen center and/or other after school programming in Madison or other surrounding areas with the addition of more teen-oriented programs and facilities.
- **Sharing multicultural wellness practices builds compassion-centered communities.**
- **Improvements to facilities maximize their value to residents and users.**

### Reflection Questions:

- Are there key stakeholders the City can leverage to support afterschool resource information dissemination?
- What opportunities exist to better engage Middleton teens with the City?
- What opportunities exist to better engage BIPOC and other underrepresented Middleton seniors with the City?
- How does the City plan to meaningfully engage underrepresented community members in the development and implementation of this strategic objective?

### Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Work with partners to expand recreation and after-school programming for community youth.</b>						
Public Lands, Recreation, & Forestry	Continue to look for joint facilities agreements with area schools as new facilities are constructed to reduce costs and increase accessibility to underserved groups, such as teens	Com. on Youth Parks, Rec. & For. Com.	School District		Ongoing	<ul style="list-style-type: none"> <li>• New agreements signed</li> <li>• Number of new programs</li> <li>• Number of participants</li> </ul>
Public Lands, Recreation, & Forestry	Develop a one-stop resource accessible through multiple media/channels to highlight after school and recreational programs	Com. on Youth Parks, Rec. & For. Com.	School District		Ongoing	<ul style="list-style-type: none"> <li>• Forums developed</li> <li>• Number of hits</li> <li>• Increase in participation</li> </ul>
Public Lands, Recreation, & Forestry	Expand arts, music, and nature-based offerings in the City's recreation and wellness programs through partnerships and as spaces become available and staffing and resources allow	Com. on Youth Parks, Rec. & For. Com.	School District		3-5 years	<ul style="list-style-type: none"> <li>• Number of new programs</li> <li>• Number of participants</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 2: Increase participation in City recreation programs by underrepresented communities.</b>						
Public Lands, Recreation, & Forestry	Explore sources of funding and partnerships that can help expand programming to increase participation by underrepresented communities	Parks, Rec. & For. Com. Comm. on Youth	Area Rec. Orgs. Health/Med. Orgs. School District		Ongoing	<ul style="list-style-type: none"> <li>Number of grants or resources approved and applied for</li> <li>Number of new partnerships</li> </ul>
Public Lands, Recreation, & Forestry	Create and implement multilingual/multicultural recreational programming with local partners, as staffing and resources allow	Parks, Rec. & For. Com.	Area Rec. Orgs. Health/Med. Orgs. School District		Ongoing	<ul style="list-style-type: none"> <li>Number of new programs</li> <li>Number of participants</li> </ul>
Public Lands, Recreation, & Forestry	Explore partnerships to expand the variety, affordability, and inclusivity of City youth recreation offerings	Parks, Rec. & For. Com.	Area Rec. Orgs. Health/Med. Orgs. School District	 	Ongoing	<ul style="list-style-type: none"> <li>Number of new programs</li> <li>Number of participants</li> </ul>
<b>Goal 3: Work with partners to develop a comprehensive recreation and wellness center and programs.</b>						
Public Lands, Recreation, & Forestry	Explore public-private partnerships for increased access to affordable recreation and wellness facilities that serve all ages and abilities, including seniors	Com. on Aging Com. on Youth Parks, Rec. & For. Com.	Area Rec. Orgs. Health/Med. Orgs. School District		Ongoing	<ul style="list-style-type: none"> <li>Number of new partnerships created</li> <li>Number of program participants</li> </ul>
Public Lands, Recreation, & Forestry	Reevaluate need and potential for a municipal comprehensive recreation and wellness center as part of the Civic Campus Study	Parks, Rec. & For. Com.		  	3-5 years	<ul style="list-style-type: none"> <li>Plan completed</li> </ul>
<b>Goal 4: Plan for and implement improvements to major open space and recreation areas and facilities.</b>						
Public Lands, Recreation, & Forestry	Complete the Cross Country Ski Complex	Parks, Rec. & For. Com.	CXC Foundation		3-5 years	<ul style="list-style-type: none"> <li>Completion of facility</li> </ul>
Public Lands, Recreation, & Forestry	Complete post-flood repairs to the Pheasant Branch Conservancy	Conservancy Lands Com. Water Res. Man. Com.	FEMA	 	1-3 years	<ul style="list-style-type: none"> <li>Completion of improvements</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
Golf Course	Develop a Golf Course Master Plan	Golf Course Adv. Com.	Consultant		1-3 years	<ul style="list-style-type: none"> <li>Completion of plan</li> <li>Number of recommendations implemented</li> </ul>
<b>Goal 5: Continue to provide quality services to older adults via the Senior Center.</b>						
Senior Center	Continue to provide evidence-based programming whenever available and feasible.	Com. On Aging			Ongoing	<ul style="list-style-type: none"> <li>Number of programs</li> </ul>
Senior Center	Encourage the expansion and promotion of the Senior Center's endowment held by the Madison Community Foundation and planned giving programs.	Com. On Aging	Madison Comm. Foundation		Ongoing	<ul style="list-style-type: none"> <li>Dollars raised/secured</li> </ul>
Senior Center	Review internal transportation systems and options for older adults, with consideration of an older adult van as a transportation option.	Ped., Bike, & Trans. Com. Com. On Aging	See Transit Partner List	 	3-5 years	<ul style="list-style-type: none"> <li>Completion of review</li> </ul>
Senior Center	Maintain Senior Center accreditation.	Com. On Aging			Ongoing	<ul style="list-style-type: none"> <li>Accreditation awarded</li> </ul>
Senior Center	Develop a comprehensive program evaluation system and services for future planning, including SWOT analysis as part of the five-year accreditation process.	Com. On Aging			1-3 years	<ul style="list-style-type: none"> <li>Completion of evaluation</li> </ul>



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# PUBLIC SAFETY & EMERGENCY MANAGEMENT

## Vision:

*Ensure that Middleton is prepared and protected for emergency events, including extreme weather and public health crisis, through appropriate investments in resources, staff, training, and partnerships.*

## Key Observations/Considerations:

- Annual EMS call volumes continue to escalate as the population of Middleton and surrounding areas grow. Consolidation of EMS services is rapidly growing across Wisconsin.
- 2013 and 2017 EMS staffing studies indicated a need to increase staffing to meet growing demand and since then that demand has continued to grow. Mental health-related calls have particularly escalated for the department.
- 2013 and 2017 Police Department staffing studies indicated a need to increase staffing to meet growing demand and since then that demand has continued to grow. Mental health-related calls have particularly escalated for the department.
- The City does not have any dedicated storm water maintenance positions. In many communities, stormwater maintenance staff are funded by the storm water utility.
- Increased stormwater facilities maintenance is needed to comply with the DNR stormwater permit and maintain community resiliency during periodic highwater or flooding events.
- Expanding relationships and cooperation with neighboring and overlapping jurisdictions, particularly regarding public safety, will increase resources and improve efficiency.
- City staff are seeking translation services from local police to serve non-English speakers.
- Residents need to establish rapport with City staff to feel confident and comfortable reporting public works hazards and/or safety situations.

## Value to Residents:

- Additional police staffing will allow continuation of expected response times to residents as well as visitors and business employees.
- Diversified emergency response staffing can improve cultural competence and increase trust between residents and first responders.
- Opportunities for partnership with regional organizations and jurisdictions increases service and improves efficiency.

## Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Develop and implement strategies to increase public safety staffing levels.</b>						
Administration	Use 2022 referendum to support additional police personnel to address identified deficiencies	City Council			2022	<ul style="list-style-type: none"> <li>Number of staff added</li> </ul>
Police Department	Continue to evaluate potential non-city funding sources to increase staffing levels	Public Safety Com.			Ongoing	<ul style="list-style-type: none"> <li>Number of sources identified</li> <li>Amount of funds procured</li> <li>Number of new staff hired</li> </ul>
Police Department	Maintain state and national accreditations	Public Safety Com.			Ongoing	<ul style="list-style-type: none"> <li>Continued accreditation status</li> </ul>
Administration Police EMS	Assess public safety and emergency management needs as Middleton grows/adds population and prepare long term strategy to address funding requirements	Public Safety Com. Emerg. Prep. Com. EMS Com.	WI Emer. Man.	 	1-2 years	<ul style="list-style-type: none"> <li>Completion of strategy</li> </ul>
<b>Goal 2: Improve recruitment, training, and compensation programs to attract and retain high quality public safety personnel.</b>						
Administration Police EMS	Continue to improve the recruitment process to attract multilingual and multicultural dispatchers and other frontline public safety staff	Public Safety Com. EMS Com. Police Com.			Ongoing	<ul style="list-style-type: none"> <li>Number of BIPOC candidates</li> <li>Number of BIPOC hires</li> </ul>
Administration	Maintain competitive wages and fringe benefits in comparison to other large Madison suburbs	Finance Committee Personnel Negotiating Com.			Ongoing	<ul style="list-style-type: none"> <li>Compensation Survey over a 5-year period for trend analysis</li> </ul>
<b>Goal 3: Expand partnerships to improve public safety efficiency and cost effectiveness.</b>						
EMS	Continue to explore additional EMS service collaboration with nearby communities	Public Safety Com. EMS Com.	Neighboring Local Governments		1-2 years	<ul style="list-style-type: none"> <li>Number of new partnerships</li> <li>% response time goals are met</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 4: Work with Dane County to improve emergency preparedness and management.</b>						
Administration Police EMS Public Works	Continue to coordinate with Dane County on the preparation and implementation of the Hazard Mitigation Plan	Emerg. Prep. Com.	Dane Emer. Man.		Ongoing	<ul style="list-style-type: none"> <li>Completion of plan and implementation actions taken</li> </ul>
Administration Police EMS Public Works	Develop and implement a training program for Emergency Preparedness Plan	Emerg. Prep. Com.	Dane Emer. Man.; Wis. Emer. Man.; Red Cross; FEMA; MCP School Dist.		1-3 years	<ul style="list-style-type: none"> <li>Training sessions offered</li> <li>Number of participants</li> </ul>
Public Works	Implement recommendations of the PSC Microgrid Feasibility Study and hire a consultant to develop a plan to build redundancy and resiliency in power grid	Sustainability Com.	Madison Gas and Electric	 	3-5 years	<ul style="list-style-type: none"> <li>Completion of plan</li> <li>Recommendations implemented</li> </ul>



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# CITY ORGANIZATIONAL & COMMUNITY DEVELOPMENT



## Vision:

*Build City- and community-based structures, systems, and institutions that promote strong relationships, advance diversity, equity, and inclusion, and help Middleton live its core principles.*

## Key Observations/Considerations:

- Coordinated communication internally and externally are lacking without a dedicated communication position.
- Need better external communication to better outreach to businesses, communities of color, and residents in multifamily developments.
- City equity efforts can seem a bit disjointed – the City needs a cohesive, overarching strategy.
- In response to the equity survey, 40% of department head respondents have limited training with any prior training, education, and/or experience with diversity, equity, anti-racism, and inclusion, and only 30% feel they understand and have experience with it.
- In response to the equity survey, the majority of Council respondents have limited training with diversity, equity, anti-racism, and inclusion while only 20% have experience with it and feel confident sharing their knowledge.
- In response to the equity survey, the majority of both department heads and council respondents understand the concept of white privilege but are unsure how to talk about it.
- In response to the equity survey, the majority of department heads and 100% of council members have a limited understanding on how to advance equitable impacts when there are adverse impacts(s) of policy on groups of people.
- Currently, Middleton has one human resources position. A part- time HR generalist could help to support the Human Resources Director particularly with recruitment and retention. This position would also provide an important back-up for this critical function.
- A communications or public information position could not only serve as a liaison between City departments and the public to help keep the community informed about City programs, services, and plans, but provide support services and project assistance for the City Administrator freeing that position to focus more steadily on big picture and management issues.
- Concerns about organizing and tracking implementation of the Strategic Plan’s action items, providing transparency and accountability to the community.

### Value to Residents:

- Residents would benefit from increased information sharing about City operations and programs.
- The public would benefit from increased communication regarding positive activity of staff and Common Council.
- With local governments no longer being the employer of choice, recruitment and employee retention is a challenge. Additional human resource staffing could increase its focus on these critical areas. Residents would benefit from increased employee retention and higher performance employee recruitment.
- Building cultural competency, language access awareness, and understanding BIPOC's and other marginalized community members' lived experiences in Middleton will enable City staff and council to make policy changes that effectively disrupt and dismantle systemic inequities.

### Reflection Questions:

- How can the City build internal support networks for City staff and council to assess and examine the causes of adverse impacts of policy on groups of people?
- How can the City differentiate itself and be an employer of choice that attracts and retains top talent and staffing?
- What type of internal and/or external support is needed to lead and/or support the development of equity-centered professional development learning opportunities for the City?
- How will the City hold internal stakeholders at all levels accountable to integrating these professional development and people-centered equity objectives?
- How does the City plan to meaningfully engage underrepresented community members in the development and implementation of this strategic objective?
- How can the City maintain its high level of citizen engagement without significantly impacting staff resources and work capacity?

## Recommended Actions:

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 1: Expand communications and outreach to residents and businesses.</b>						
Administration	Use referendum to create a dedicated public information/communications position to manage a cohesive message across departments and Council	Finance Com.		  	2022	<ul style="list-style-type: none"> <li>Position created and filled</li> </ul>
Administration	Ensure the use of multiple languages in City materials, platforms, presentations, and communications to expand accessibility to city information	City Council		  	Ongoing	<ul style="list-style-type: none"> <li>Number of new platforms used</li> <li>Number of users</li> <li>Citizen satisfaction survey re: City communication</li> </ul>
Administration	Continue to utilize website and email subscriptions to disseminate information	City Council		  	Ongoing	<ul style="list-style-type: none"> <li>Number of webpage hits</li> <li>Number of downloads</li> </ul>
Administration	Prepare and distribute monthly news summaries	City Council		  	2-3 years	<ul style="list-style-type: none"> <li>Number of summaries provided</li> <li>Number of subscribers</li> </ul>
<b>Goal 2: Increase engagement with residents and resident involvement in decision making.</b>						
Administration	Continue virtual and hybrid meetings and invest in technology to increase participation by the public	Finance Com.		  	1-2 years	<ul style="list-style-type: none"> <li>Virtual meeting technology purchased and deployed</li> </ul>
Administration	Create new, formalized communication structures for alders and city staff to work together, including in hosting meet and greets and city meetings out in the community, increasing accessibility by bringing city functions and decision makers out of city hall and into the community	City Council		  	1-2 years	<ul style="list-style-type: none"> <li>Number of engagement events</li> <li>Number of participants</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
Mayor Administration	Formalize processes for reviewing and deciding on applications for committee appointments	City Council		 	2-3 years	<ul style="list-style-type: none"> <li>Process defined and implemented</li> </ul>
Mayor Council Administration	Review responsibilities of all commissions and committees to reduce redundancy and improve effectiveness	City Council			3-5 years	<ul style="list-style-type: none"> <li>Evaluation completed</li> <li>Recommendations implemented</li> </ul>
Administration	Review the addition of a full time Volunteer Coordinator position that could assist across City departments.	Council		 	1-3 years	<ul style="list-style-type: none"> <li>Position created and filled</li> </ul>
Administration	Expand awareness in the public of committee purposes, openings, and ways to become involved in City government	City Council		  	3-5 years	<ul style="list-style-type: none"> <li>Number of applicants</li> <li>Number of new members</li> </ul>
<b>Goal 3: Develop a city-wide strategy to address issues around equity, anti-racism, and inclusion.</b>						
Administration	Partner with schools to build upon the existing awareness of the importance of DEI	City Council	School District	 	Ongoing	<ul style="list-style-type: none"> <li>Programs implemented</li> </ul>
Administration	Create a leadership level permanent staff position that addresses equity issues across the city	Finance Com.		 	3-5 years	<ul style="list-style-type: none"> <li>Position created and filled</li> </ul>
Administration	Develop an open dialogue forum facilitated by members of the community to share their lived experiences in Middleton	City Council			1-2 years	<ul style="list-style-type: none"> <li>Pulse survey assessing community member feedback on forum</li> </ul>
Administration	Develop a city-wide strategy to address issues around equity, anti-racism, and inclusion (led by the equity-centered leadership position)	City Council		 	3-5 years	<ul style="list-style-type: none"> <li>Strategy completed</li> <li>Recommendations implemented</li> <li>Number of BIPOC members on City committees/commissions</li> </ul>

Department	Recommended Action	Commissions/Committees	Partners	Core Principles	Timeline	Metrics & Outcomes
<b>Goal 4: Develop and implement a comprehensive approach to addressing diversity, equity, and inclusion in all aspects of City operations.</b>						
Administration	Incorporate cultural competency assessment and education into staff training and operations	City Administrator and HR Manager		 	1-2 years	<ul style="list-style-type: none"> <li>• Programs offered</li> <li>• Number of participants</li> </ul>
Administration	Develop individual and collective professional development programs centering key equity topics and with an emphasis on equity-centered policy and systems assessment and change	City Administrator and HR Manager	CIVMIC Insurance	 	1-2 years	<ul style="list-style-type: none"> <li>• Programs offered</li> <li>• Number of participants</li> </ul>
Administration	Embed equity-centered professional development and learning for elected officials and volunteer onboarding processes	City Council, City Administrator and HR Manager		 	3-5 years	<ul style="list-style-type: none"> <li>• Programs offered</li> <li>• Number of participants</li> </ul>
<b>Goal 5: Implement the Middleton Strategic Plan and regularly review action item progress.</b>						
Administration	Purchase Strategic Planning Implementation Software Platform	Finance Com.			1-2 years	<ul style="list-style-type: none"> <li>• Quarterly reporting of action item status</li> </ul>
Administration	Incorporate Strategic Plan Core Principles into departmental reports, Council agendas, and City communications	City Council		 	Ongoing	<ul style="list-style-type: none"> <li>• Updated agenda, report, and communications</li> </ul>
Administration	Publish a Strategic Plan implementation progress report annually/biannually	City Council		 	Ongoing	<ul style="list-style-type: none"> <li>• Annual reporting of action item status</li> </ul>



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# Middleton Strategic Plan

## Appendix A.

## **FINANCIAL REVIEW**

Based upon Middleton's Comprehensive Annual Financial Report (CAFR) for the fiscal year ended December 31, 2020, the city's finances are in very good condition. Essential to Middleton's fiscal health is its solid General Fund balance, high credit rating (Aa1 Moody's Investors Service), and modest use of its borrowing capacity.

### **Financial Planning**

A key component of the city's financial planning process are the annual updates to its five-year capital improvement plan. This plan identifies capital needs for all the city's funds and lists priorities and financing sources.

The city will receive federal assistance under the American Rescue Plan Act in two equal payments in mid-2021 and 2022. Middleton has not determined its spending plan for the estimated \$2.1 million allocation.

### **Financial Policies**

Middleton has adopted financial policies related to general fund balance, debt management, and budget development.

- **General Fund Balance:** The policy stipulates that unassigned fund balance should equal two to four months of the subsequent year's general fund budgeted expenditures (16.7 percent to 33.3 percent). At the end of 2020, the unassigned fund balance was 29.6 percent.
- **Debt Management:** At the end of 2020, Middleton had \$40,540,000 in outstanding debt or 19.7 percent of its legally available general obligation debt capacity. By comparison, city policy establishes a debt cap to not exceed 66.6 percent of its capacity.
- **Budget Development:** The 2021 budget is in compliance with the State of Wisconsin Expenditure Restraint Program and Wisconsin Levy Limit.

### **General Fund Financial Performance**

#### **A. Expenditures**

Excluding transfers, Middleton's 2020 CAFR shows that public safety comprises 48 percent of expenses, public works is 21 percent, general government is 17 percent, leisure activities are 8 percent, conservation and development is 4 percent, and health and human services comprise 3 percent.

#### **B. Revenues**

Middleton's audited, actual adjusted revenues for 2020 show that taxes comprise the largest share of revenues at 63 percent, intergovernmental revenues at 13 percent, interdepartmental charges for services at 7 percent, other charges for services at 6 percent, licenses and permits at 5 percent, investment income at 3 percent, special assessments at 1 percent, and miscellaneous revenues at less than 1 percent.

Of the \$336,742 in COVID-19-related Route to Recovery funds received in 2020, \$298,818 was allocated to the General Fund. Room Tax decreased by \$500,928 over projected in 2020 and was the most significantly impacted revenue source.

Middleton, as compared to its Dane County peer municipalities, has one of the lowest property mill rates with \$5.65 per \$1000 equalized valuation. It also had the largest percentage decrease in mill rates (15%) over the past five years. The per capita property tax valuation is \$181,948, the highest in the county.

	<u>2015 Tax Year</u>	<u>2019 Tax Year</u>
<b>City of Stoughton (12,954 population)</b>		
Mill Rate	\$8.57	\$8.00
Tax Levy	\$7,914,654	\$9,383,714
Full Property Value (millions)	\$954	\$1,233
<b>Village of Waunakee (14,399 population)</b>		
Mill Rate	\$6.30	\$5.64
Tax Levy	\$9,061,712	\$ 10,884,476
Full Property Value (millions)	\$1,495	\$2,070
<b>City of Middleton (21,050 population)</b>		
Mill Rate	\$6.61	\$5.65
Tax Levy	\$16,386,140	\$17,985,016
Full Property Value (millions)	\$2,907	\$3,830
<b>City of Fitchburg (30,391 population)</b>		
Mill Rate	\$8.13	\$7.74
Tax Levy	\$19,769,244	\$23,733,085
Full Property Value (millions)	\$2,711	\$3,419
<b>City of Sun Prairie (35,895 population)</b>		
Mill Rate	\$8.28	\$7.21
Tax Levy	\$20,195,113	\$24,547,028
Full Property Value (millions)	\$2,566	\$3,634

### **Special Revenue Fund Financial Performance**

Middleton has 14 special revenue funds: subdividers' deposit, lost and damaged books, library gift, library endowment, next chapter, library, safety impact fee, economic development grant, tourism commission, police activities, EMS activities, public land activities, youth center activities, and senior center activities. Subdivider's deposit, tourism commission and public land activities funds have the highest fund balances with over \$1 million each. Three funds had decreases in fund balance in 2020: next chapter, economic development, and tourism commission funds.

### **Debt Service Fund Financial Performance**

Of the 2019 tax rate (to fund the 2020 budget) of \$5.65, Middleton allocated \$1.50 per \$1000 equalized property valuation toward annual debt service payment of

approximately \$5 million. This compares favorably to the 2015 tax rate of \$1.73. With the impact of the Five-Year Capital Improvement Plan and related projected debt, the tax rate needed to pay \$7 million in annual debt service will increase in 2027 to \$2.00.

For the year ending 2020, the per capita general obligation debt was \$1,984 as compared to \$2,574 in 2016.

Currently 93% of the city's debt is scheduled to be paid within ten years.

### **Capital Projects Funds Financial Performance**

Tax Incremental District #3 Fund (created in 1993 and projected closing in 2030) accounts for property tax increments resulting from development activities and payments to developers as incentives from new development activities: Greenway Center area, the Discovery Springs, and the Downtown rehabilitation. Even after a subtraction of property from the TID boundary in 2020, TID #3 continues to be very successful with \$545 million in increment valuation as of January 1, 2021.

TID #5 Fund (created in 2009) accounts for property tax increments resulting from development activities and payments to developers as incentives from redevelopment between the Highway 12 and Parmenter Street corridors, the Allen Boulevard commercial area, as well as in Middleton's urban greenway. TID #5 had an incremental value of \$125 million and a fund balance of -\$990,605 as of January 1, 2021. Several projects are currently under construction and are expected to add significant value. City officials project that TID #5 will have a positive fund balance by 2026.

The General Capital Project, Public Works Capital Construction, and Public Lands Capital Construction have a combined fund balance of \$2.2 million. Revenues for these funds are mostly generated by the annual sale of general obligation notes.

### **Enterprise Funds Financial Performance**

Middleton has six enterprise funds: Water Utility, Sewer Utility, Pleasant View Golf Course, Stormwater Utility, Middleton Utility District and Airport Fund.

In 2020, the Water Utility had operating revenues of \$2.7 million and an operating income of \$704,261. The last water rate increase became effective September 2018. Currently, the Wisconsin Public Service Commission is reviewing a city-requested rate increase with an effective date of 2022.

In 2020, the Sewer Utility had operating revenues of \$2.9 million and an operating loss of \$168,774. The city contracts with the Madison Metropolitan Sewerage District for sewage treatment. The last sewer rate increase became effective December 2020 and is projected to increase revenue by in \$574,272 in 2021.

With operating revenues of \$3.2 million in 2020, the Pleasant View Golf Course had an operating income of \$1 million.

In 2020, the Stormwater Utility had operating revenues of \$861,325 and a net operating income of \$387,873. As of December 2020, the Utility had no outstanding revenue bonds. The last stormwater rate increase became effective April 2019.

In 2020, the Airport Fund had operating revenues of \$134,833 in 2020, and an operating loss of \$37,809.

In 2020, the Middleton Utility District had no operating revenue and an operating loss of \$2,085.

### **Fiduciary Fund Financial Performance**

The Middleton Fire District provides comprehensive fire-related services to the city and three area towns. Each entity contributes a pro rata population-based contribution to the district. Over 100 volunteers provide the primary staffing resources to the district along with six full-time, paid staff. In 2020, the Fire District had a net position of \$52,526.



Middleton Strategic Plan  
Advisory Committee Packet  
October 13<sup>th</sup>, 2021

**TABLE OF CONTENTS:**

**1. Agenda . . . . . 2**

**2. Middleton Strategic Plan Process . . . . . 3**

**3. Advisory Committee Members & Role . . . . . 4**

**3. Common Council & Department Head Interviews Summaries . . . . . 5**

**4. Common Council & Department Head Equity Survey Results . . . . . 14**

**5. City Organizational Structure & Financial Review Summary . . . . . 32**

**6. Vision Panels Summaries . . . . . 41**

**7. Draft Asset & Opportunity Analysis . . . . . 57**

**Advisory Committee Task**

**Review packet and come prepared to discuss the following questions:**

**Committee Discussion Questions:**

1. From the materials provided, what themes/issues are resonating with you?
2. What other emerging themes or issues should be considered for the framework?
3. From the materials provided, what aspirations and attributes are resonating with you?
4. What are other emerging aspirational components that should be considered for the Vision?

# City of Middleton Strategic Plan Advisory Committee Meeting

City of Middleton, WI

Date: Wednesday, October 13<sup>th</sup>, 7:00pm-8:30pm

Zoom Link: <https://us06web.zoom.us/j/89730910820?pwd=bGFkd3UxaDdqOHkvb2ZHejU1UXVpUT09>

Meeting ID: 897 3091 0820

Passcode: LX3U7J8%

Dial by your location

+1 312 626 6799 US (Chicago)

Meeting ID: 897 3091 0820

Passcode: 12604329

**Meeting Purpose:** briefly review work completed to date and discuss emerging themes and ideas to inform the Vision and Framework.

**Note:** The public is welcome to attend the Committee meeting, but public comment will not be taken at this meeting. A virtual visioning workshop will be held on Thursday, November 4<sup>th</sup> from 6pm-8pm at which all members of the public are strongly encouraged to attend to share their thoughts on the information being provided and discussed at the Committee meeting.

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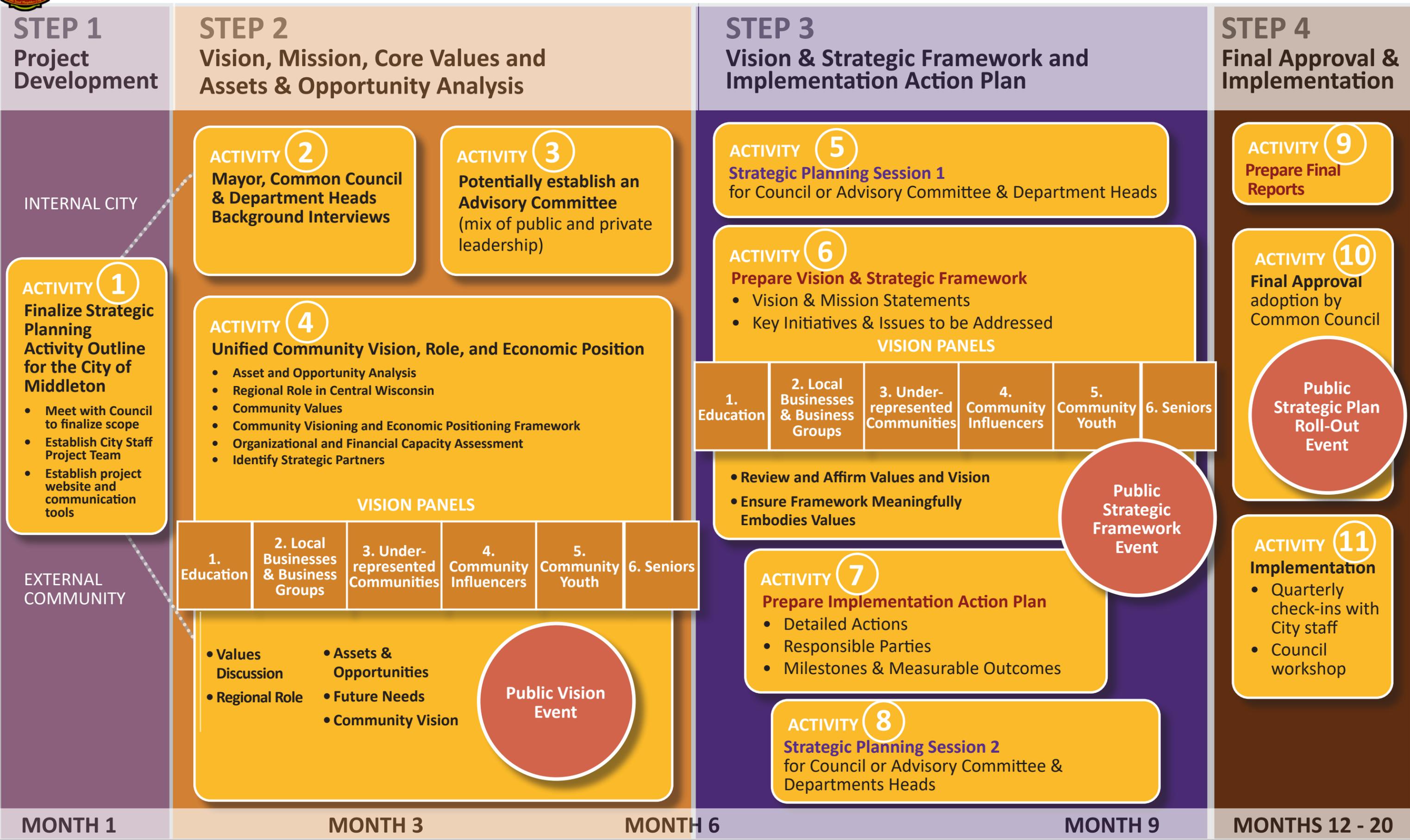
#### ADVISORY COMMITTEE:

- |                |                 |                    |
|----------------|-----------------|--------------------|
| • Luke Fuzard  | • Dana Monogue  | • Dom Ricks        |
| • Jon Denissen | • Ellen Carlson | • Kurt Paulsen     |
| • Erin Summers | • Lisa Janairo  | • John Schaffer    |
| • Jill Kranz   | • Doug Zwank    | • Jocelyne Sansing |

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#### AGENDA:

1. Welcome and Introductions
2. Middleton Strategic Plan Process Overview
3. Overview of Key Findings
  - a. Firms
    - i. Vandewalle
    - ii. EQT by Design
    - iii. Public Administration Associates
  - b. Clarifying questions about information contained in meeting packet
4. Committee Discussion
  - a. From the materials provided, what themes/issues are resonating with you?
  - b. What other emerging themes or issues should be considered for the framework?
  - c. From the materials provided, what aspirations and attributes are resonating with you?
  - d. What are other emerging aspirational components that should be considered for the Vision?
5. November Public Vision Event Overview



**City of Middleton Strategic Plan Advisory Committee**

<b>Composition of Advisory Committee</b>	
Number on committee: 12	
Organization/Representatives	
• Elected Official (1)	<b>Luke Fuszard, Common Council Member</b>
• Vision Panel Representatives (8)	
• Business Community Representatives	<b>Jon Denissen, Senior VP of PPD</b>
• Community Youth Representative	<b>Erin Summers, Arts Committee &amp; formerly PRFC</b>
• Senior Representative	<b>Jill Kranz, Retired Senior Center Director</b>
• Education Representative	<b>Dana Monogue, Superintendent of MCPASD</b>
• Underrepresented Communities Representative	<b>Ellen Carlson, Executive Director of MOM</b>
• Community Influencer/ Champion/ Ambassador	<b>Lisa Janairo, Sustainability Committee Chairperson Doug Zwank, Former Mayor of Middleton</b>
• Education/Underrepresented communities Representative	<b>Dom Rick, Principal of Kromrey Middle School</b>
• City Committee Members (2)	<b>Kurt Paulsen, Plan Commission John Schaffer, Parks Recreation &amp; Forestry Commission</b>
• City Staff (1)	<b>Jocelyne Sansing, Director of Library</b>

- Purpose
  - Connection between the community and the Council in the Strategic Plan process
  - Sounding board in the planning process
  - Provide input to Council on direction/initiatives
  - Will not make a formal recommendation to Council for approval
  - Not a decision-making body
- Timing/Level of Commitment
  - 5 meetings/work sessions over planning timeline
  - Share input from member’s constituency/network
  - Share updates on planning process with member’s constituency/network
- General Composition
  - Number on committee: 12
  - Composition should represent a diversity of stakeholders, including participants already engaged in the process, such as the Vision Panels

To: Middleton Strategic Plan Advisory Committee  
From: Vandewalle & Associates  
Date: Thursday, October 07, 2021  
Re: Middleton Strategic Plan – Department Head Meeting Summary

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On June 23, 2021 the Middleton Strategic Plan consultant team held an informational stakeholder meeting with City of Middleton Department Heads to gather input on key issues for the Strategic Plan. Below is a summary of key themes that emerged from the discussion. You can find the full Department head summary in the following pages. Note that this does not represent a consensus or even majority of Department Head opinions on these issues. Not all Department Heads discussed or agreed with everything included here.

## DEPARTMENT HEADS -- SUMMARY OF KEY THEMES

- City responded very well to COVID in keeping employees safe and working effectively.
- Recent investments in IT and personnel manager have been highly effective and appreciated.
- Library and senior center are highly-used and valued but are at their maximum capacity.
- Staffing levels are not keeping up with demands; there is no capacity to do anything more.
- Events nationally and in Madison area have negatively impacted morale in police department and have been a contributing factor to staffing turnover.
- Staff works well together across departments, and the organization is recognized by peers across the state as a great place to work.
- Challenges in communicating with the public across departments – need a dedicated position.
- Good relationships and open communication with City Council.
- Current mayor is much more hands-on than past mayors; can be difficult to respond to his requests without impacting on-going services and projects; many requests should be discussed and approved by City Council before approaching staff.
- Need to improve engagement with underrepresented communities, but need more training on how to be more effective with that.
- Need to increase diversity of City staffing; working to make improvements with this but has been a challenge attracting qualified candidates.
- Community in general needs to be more welcoming to BIPOC; Council needs to take a true leadership role with this.

## FULL SUMMARY OF DEPARTMENT HEAD INTERVIEWS

### Recent Accomplishments:

- Middleton responded well to the challenges of COVID and in many ways still had a strong year.
  - City staff adapted well to workplace changes and were able to keep service to residents at levels high while keeping employees safe. Workplace flexibility and adaptation to work-from home where feasible was successful and valued by many employees, presenting an opportunity for these flexibilities to continue in the future.
  - The City of Middleton responded to COVID's economic crisis with creativity, particularly Tourism, which lost significant revenue but helped support tourism/hospitality and small businesses, minimizing the consequences for Middleton's downtown. This support was well received by small businesses and further strengthened the City's relationship with its business community.
- Investments in IT and technology have improved internal work systems and services at the City. Movement toward cloud-based systems helped the City weather COVID much easier.
  - Improvements in technology have facilitated more public engagement as residents can now attend Council meetings virtually, etc.
- Public safety is extremely important in the community and the Middleton Police Department has made it through challenging times well in the last year. Morale and employment have been impacted, as attracting new hires/applicants have been difficult for both police and EMS.
- Community Facilities and personnel.
  - The golf course had a record year and it is considered one of the best in Dane County.
  - Senior Center and Library had a very good year. Each facility adapted in 2020 to provide a high level of services to its constituencies, including critical welfare calls and community support efforts during a difficult year for residents.
  - Hiring a full-time HR manager has improved how the City functions as an employer and staff are happy with the changes this position has brought to Middleton. How the City hires for open positions is particularly improved.
- Some important efforts and projects were put on hold in 2020, which will need to be addressed in the future, including the Civic Campus Plan, University Avenue Corridor Plan, fundraising for Stone Horse Green, airport master plan, some staffing and technology additions, and flood mitigation/improvements.

### Middleton's Distinguishing Characteristics:

- Middleton has a diverse tax base with both business and residential which makes it able to recover and be more resilient in down times.
- Middleton provides a high level of services and amenities for its residents, providing a high quality of life while maintaining a small-town feel. Middleton is safe and public safety is valued. There are dining and retail options in the City, so residents are able to stay in town to find entertainment. There are many recreation options in Middleton with strong facilities, including the golf course, pool, and parks. Middleton's location is also an advantage – adjacent and accessible to Madison but with a more hometown character.
- Middleton has an excellent school system which brings new residents to town.

- Middleton has incredible natural amenities, which provide residents with abundant green space and access to nature. The Pheasant Branch Conservatory is a unique asset and the city's greenway and trails connect its many natural/outdoor recreation assets.
- Middleton is a great place to live and work and is generally regarded, across all department areas, as one of the best communities to work for in the state. City Administration and Department Heads are very professional and passionate.

### Primary Challenges to Accomplishing Goals:

- Middleton is essentially a land-locked community. It is unable to grow beyond its boundaries, therefore growth and development need to occur within the community as infill, redevelopment, and increased density.
- State-imposed levy limits restrict the City's ability to increase taxes without a referendum in order to maintain a high level of services to residents and continue to provide the quality of life that Middleton is known for. Additional staffing is also needed to maintain these service levels.
- Constraints on public facilities, including City Hall, library, senior and youth center. The Pre-COVID campus needs assessment needs to be reconsidered.
- Need community support to accomplish goals and address barriers and staff needs the public to be more aware of their efforts and accomplishments. It is currently difficult to communicate and inform the public.
  - Communication needs to be centralized. A public information officer or channels for communication with the public that did not add to staff workload would help.
- Changes in City Administration leadership will leave a big hole in institutional knowledge at a critical point in Middleton's history.

### Internal Cooperation:

- Staff feel that they are able to effectively communicate with Council and other elected officials about issues, projects and needs.
- Some additional education and understanding could ensure that elected officials have the information they need to make decisions, particularly with decisions that relate to City values and identified priorities. Some issues/areas where this education could be helpful include:
  - Technology investment
  - Building standards
  - City budget and the history of how processes/projects evolved to their current status
  - Infill development costs and savings
- Elected officials are very responsive to public input, questions, and concerns, but it can be challenging as a staffer when individual issues are raised and asked to be prioritized over other existing efforts.
- Elected officials and staff could better communicate with the public to explain why some projects, like infill multi-family, are needed in Middleton and how they align with Middleton's plans and priorities.

### Equity and Inclusion:

- Staff would like to know more about how Middleton can hire a more diverse workforce. This is an issue across all departments, but especially public safety and EMS.
- Staff can face challenges with diversity and inclusion when there are language barriers with residents, but there are resources through the police department, senior center, and library that can assist staff.
- The senior center, library, parks department, and building inspection department in particular serve diverse constituencies.
- There have been issues recently where public used coded or veiled language in public meetings and not enough was done to correct this or emphasize diversity, equity, and inclusion as the Middleton values that Council declared them to be when they passed DEI resolutions. It is important that the City avoid empty gestures around these issues.

To: City of Middleton Advisory Committee  
From: Vandewalle & Associates  
Date: Thursday, October 07, 2021  
Re: Middleton Strategic Plan – Council Interview Summary

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From July 1<sup>st</sup> through July 9<sup>th</sup> the Middleton Strategic Plan consultant team held informational interviews with City of Middleton Common Council members, including the Mayor, to gather input on key issues for the Strategic Plan. Below is a summary of key themes that emerged through the discussions. You can find a full summary of the topics and issues discussed in the following pages. Note that this does not represent a consensus or even majority of Council opinions on these issues. Not all Council members discussed or agreed with everything included here. Overall, Middleton’s Council is comprised of individuals with a mix of backgrounds, professions, and interests.

## COMMON COUNCIL - SUMMARY OF KEY THEMES

- Council members have wide areas of interest between them but share common interests in supporting essential services of public safety and public works.
- Schools are excellent and a primary draw of residents to the community.
- Small town feel with all of the amenities plus easy access to Madison
- City responded exceptionally well to Paradigm shooting, 2018 flood and COVID.
- City provides exceptional value for high level of services provided, but will be hard to sustain without change in state law or tax referendum; City staff is at capacity.
- City finances are excellent; highly successful use of TIF.
- Good relationships and open communication with department heads.
- Need for new civic campus (city hall, senior center, library), but cost will be a challenge.
- Natural areas, sustainability and resiliency are important and defining features for the City. Need to make further stormwater improvements.
- Downtown is a success and continues to improve.
- Need to continue educating public on need for infill development.
- Need to create affordable home-ownership opportunities as part of infill development.
- Need to continue improvements to alternative (non-car) transportation options.
- Need to further improve communications with the public – may necessitate a dedicated position.
- Need to improve welcoming and engagement with underrepresented communities and providing opportunities for being part of decision-making processes.

## FULL SUMMARY OF COMMON COUNCIL MEMBER INTERVIEWS

### Key Issues:

- Middleton provides a high level of services and needs to maintain that standard.
  - City is landlocked – growth can't occur by expanding boundaries; need infill and redevelopment
- Maintain roads and infrastructure
  - The City has an inspection and maintenance plan and has been able to move through that plan while also addressing emergencies as they come up.
- City needs to address disparities in opportunity, equity, and racial justice both within the populace and city operations.
- City is still recovering from 2018 flood. Future flood mitigation is necessary to be more resilient.
- Issues of housing affordability and increasing diversity of housing options need to be addressed.
  - There is a missing middle in the housing market
  - Want to provide affordable options, but maintain high standards (design, construction, materials, etc.)
  - Want more owner-occupied options (condos) vs. just rental
- Public and elected officials have concerns about higher density/taller buildings, but also recognize it is necessary.
  - Although there are density corridors where it makes sense to focus infill, but there are concerns about distribution of rental/infill within the community and not concentrating it in just one or two areas/districts.
  - City needs to explain to residents why some areas are better for dense development and how it will help the City be better served by bus/BRT service.
  - Without education of public, there will continue to be resistance/opposition.
  - Residents are ok with reasonable development; haven't identified/defined what unreasonable.
- University Avenue redevelopment is a priority.
- Airport issues have been a challenge; need to complete process and move on.
- Need improvements for bike, ped, and transit to make it a more accessible community that is easier to get around and doesn't require a car for every trip.
- Public safety is excellent and a top issue for the residents, but facing challenges with hiring, retention, and morale.
- Middleton needs to continue to build/grow quality of life amenities:
  - Parks, open space, recreation
  - Public art
  - Accessible community facilities
- Critical future staffing and administration needs and changes:
  - City Administrator
  - Need to consider a Public Information Officer position
  - Need more police officers
  - Need to keep up staff levels in general to keep service levels high; existing staff is at the maximum of what can be accomplished – can't keep adding demands

### Recent Accomplishments:

- Road maintenance progress
- Lakeview Park improvements
- Downtown progress
- Golf Course is self-sustainable
- Sustainability – stormwater utility, recycling booklet, solar projects

### 5-Year Goals:

- City Campus with new city facilities
  - Still need a campus plan to determine best approach
- Encourage more equitable/affordable housing development, particularly homeownership options
- More diversity/representation
- More public/resident participation

### Middleton's Distinguishing Characteristics:

- Middleton is the Good Neighbor City – people are friendly.
  - Its regional location gives it access to Madison and the bigger city but has a small-town feel.
- Lower taxes compared to other communities in the region.
- Reputation for good government and responsible finances, while providing high level of services.
- Good schools.
  - Sometimes City is victim of school board's success as it attracts new residents; City has to expand services.
- From residents of color: not very welcoming – can have a NIMBY attitude.
- Middleton has more rental opportunities compared with other suburbs.
- Amazing natural and open space amenities, like Pheasant Branch.
- From the outside, Middleton is seen as an affluent, white community.
  - Have had incidents with racist/classist attitudes in public meetings.
  - Demographics are changing in the community.
  - Middleton is a small town but has amenities/things to do that serve residents and bring people into the City, like restaurants, downtown, hotels, diverse businesses including tech.

### Primary Challenges to Accomplishing Goals:

- People expect same level/higher level of services, but City is unable to raise taxes without referendum.
- Communication and education of public on critical issues.
- Affordability – need more options to keep Middleton an accessible community.

### Taxes:

- Middleton provides a good value to residents.
  - High level of services for low taxes.

- Outlook on potential referendum:
  - Would need to educate people on the reasons.
    - Can be perception of a management failure when community has to go to referendum.
    - Would need to be very transparent.
  - Timing is will be important.
  - There are people on fixed income that can't absorb the increase in taxes.
- Look at other ways to grow tax base.
  - Attract technology firms and high paying jobs.
- Also look at reducing costs.
  - How to further streamline staff – need to justify staff increases.

### City Operations:

- Essential city services:
  - Roads and public works
  - Garbage and recycling
  - Library
  - Parks, recreation, open space
  - Public safety
- Future service needs:
  - Transit/bus services
- Public Communications:
  - Hear from residents that they don't know what is going on.
    - City is doing some things, but they aren't working well enough.
    - There is a public responsibility – residents need to be willing to hear/learn/be interested in things.
  - Need to better educate people on reasons for decisions.
  - Also need to be able to alert people on immediate things (emergencies).
  - Current network not effective enough.
  - City needs a PIO – staff don't have capacity or the training for public communications.
  - Also, a responsibility of council members to talk to/inform their constituents.
  - Need a better website and social media.
- Internal City Operations:
  - There is good communication between staff and council.
    - Staff is always willing to answer questions.
  - A weekly/consistent update/briefing on the hot topics in different departments would be helpful.
  - Could get information to Council a little earlier.
- HR Director has made a big change.
  - Have quality staff, very professional.
  - Perhaps could flatten some departments.
    - Don't always need more people.
- More seamless process for infill development/redevelopment.
- More collaboration/context for budget requests.

- Departments sometimes ask for things they know we don't have the budget for – Council has to be the bad guy.

### Diversity, Equity, and Inclusion:

- City needs to acknowledge its past and address its discrepancies.
  - Past redlining.
  - Important to the future of the City.
  - Sometimes the public doesn't recognize these issues – need to have more education/conversation.
- City also needs to be willing to take action.
  - So far, Council has been willing to state DEI values, but need to implement them.
- Middleton has great schools, but there are achievement gaps between black and white students.
  - It is the School District's issue, but it affects all of us.
- Have seen problematic attitudes during development discussions.
  - Coded and overt language.
  - Council needs to do more to call it out and stop it.
- Need to work on engaging and communicating with BIPOC communities.
- Consider redistricting City wards.
  - Diversity/people of color are primarily in one ward – not representative.
    - Concentrates that perspective to just one vote on Council.

# Middleton Equity Survey

Department Head + Council Member Results

September 2021



# Demographics (majority)

## Age

- **Council:** 40% 35-44
- **Dept Head:** 40% 45-64

## Tenure with the City of Middleton

- **Council:** 60% have served more than 2 terms
- **Dept Head:** 60% 7+ years

## Gender

- **Council:** 80% Male  
20% Female
- **Dept Head:** 70% Male  
30% Female

## Race/Ethnicity

- **Council + Dept Head:** White / Euro-American centric

## Identify as LGBTQ+

- **Council:** 100% No
- **Dept Head:** 90% No

## Responses

- **Council :** 6
- **Dept Head:** 10

# Key Findings - Dept Head

## Talking about Race / Diversity, Equity, Anti-Racism, and Inclusion

- Majority of the respondents are **comfortable with talking about race** or are working on being comfortable
- Respondents **worry occasionally** about saying the wrong thing when talking about diversity, equity, anti-racism and inclusion. However, **90% are comfortable when others talk about** diversity, equity, anti-racism, and inclusion
- 90% of department head respondents **feel comfortable** when **others** talk about diversity, equity, anti-racism, and inclusion while 10% are **working on being comfortable**

# Key Findings – Dept Head (cont'd)

## Training / DEI Terms

- 40% of respondents have **limited training** with any prior training, education, and/or experience with diversity, equity, anti-racism, and inclusion while 30% feel they **understand** and **have experience** with it
- 50% of respondents feel **somewhat knowledgeable** about different DEI work terms and 30% **understand it and feel confident** talking about it to others

# Key Findings – Dept Head (cont'd)

## Race / Racism / White Privilege

- Respondents **somewhat understand** how race is constructed but are split between feeling **unsure how** to talk about it with **understanding it** and **feeling confident** talking about it with others
- 50% of department head respondents **understand** how racism works and **feel confident** sharing it with others
- Majority of respondents **understand** the concept of white privilege and **feel confident** sharing it with others

# Key Findings – Dept Head (cont'd)

## Adverse Impact / Examine the Causes / Advancing Equitable Impacts

- 40% of department head respondents **know how** to assess the adverse impact(s) of policy but are **unsure how** to put into action
- 40% of respondents **know how** to examine the causes of adverse impact(s) of policy on groups of people but are **unsure** what to do when they uncover the causes
- Majority of respondents have a **limited understanding** of how to advance equitable impacts when there are adverse impact(s) of policy on groups of people

# Key Findings – Dept Head (cont'd)

## Assess Viability / Support to change policy / Changes w/ an equity lens

- Department head respondents are **evenly split ( 40%)** with having a **limited understanding of how** to assess the viability, sustainability, and success of equitable impact(s) of policy on groups of people with **knowing how** to assess but **unsure how** to put it into action
- 40% of respondents said **there is strong support** to make changes to policy and programs with an equity lens while 30% said **there is some support** to make changes to policy and programs with an equity lens
- 40% of respondents said **there will be some support and implementation** with efforts to make changes with an equity lens while 30% said **there will be strong support and implementation**

## Talking about Race / Diversity, Equity, Anti-Racism, and Inclusion

- Majority of the council respondents are **working on being comfortable** talking about race followed by 40% of them comfortable talking about race
- 80% of respondents **worry occasionally** about saying the wrong thing when talking about diversity, equity, anti-racism and inclusion. While **20% do not worry about saying the wrong thing when talking about** diversity, equity, anti-racism, and inclusion
- 100% of Council respondents **feel comfortable when others** talk about diversity, equity, anti-racism, and inclusion

# Key Findings - Council

## Training / DEI Terms

- Majority of respondents **have limited training** with diversity, equity, anti-racism, and inclusion while **20%** have experience and understand, and feel confident sharing their knowledge.
- Council respondents are **evenly split ( 40%)** with **feeling somewhat knowledgeable** about different DEI terms and equity and understanding the terms but **unsure how to talk about them.**

# Key Findings – Council (cont'd)

## Race / Racism / White Privilege

- Majority of council respondents **somewhat understand** how race is constructed while 40% of them understand but unsure how to talk about.
- Council respondents are **evenly split ( 40%)** with feeling they **somewhat understand** how racism works and **understanding how** racism works **but unsure how to talk about it.**
- 80% of council respondents **understand the concept of white privilege but unsure how to talk about it.**

# Key Findings – Council (cont'd)

## Adverse Impact / Examine the Causes / Advancing Equitable Impacts

- Majority of respondents have **limited understanding** of how to assess the adverse impact(s) of policy on different groups of people
- Council respondents are **evenly split ( 40%)** with **not knowing** how to examine the causes of adverse impact(s) of policy on groups of people with **having limited understanding** of how to examine the causes.
- 100% of respondents have a **limited understanding** on how to advance equitable impacts when there are adverse impacts(s) of policy on groups of people

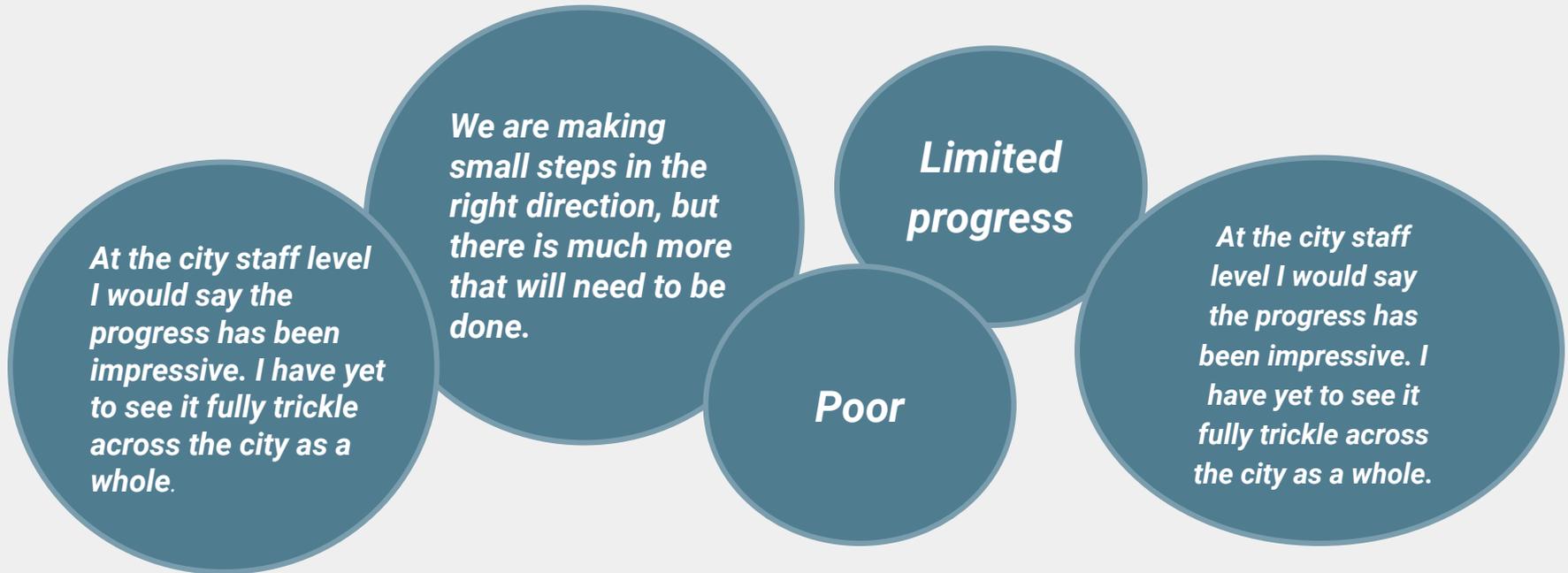
## Key Findings – Council (cont'd)

## Assess Viability / Support to change policy / Changes w/ an equity lens

- Council respondents are **evenly split ( 40%)** with **not knowing** how to assess the viability, sustainability, and success of equitable impact(s) of policy on groups of people with **having limited understanding** of how to assess the viability, sustainability, and success.
- Majority of respondents state **there is some support** to make changes to policy and programs with an equity lens.
- 40% of respondents state **there will be some** support and implementation with efforts to make change with an equity lens.

# Key Findings – Council (cont'd)

The established 2021 Equity values statement asserts that the City of Middleton “celebrate[s] and strive[s] for fair and just opportunities and outcomes for all people.” How would you describe the City of Middleton’s progress toward operationalizing this value?



**What do you think are the City of Middleton's most pressing opportunity areas for better engaging and supporting the community around issues of equity, anti-racism, and inclusion? (Council)**

*Housing*

*Action  
not just  
words*

**One major  
opportunity would  
be to have a  
Communications /  
Public Relations  
Director.**

**Holding online dialogues  
facilitated by members of the  
Middleton community in which  
they share their own experience  
as a person of color interfacing  
with the various structures we  
have in place.**

- *Money, time, and a clear understanding of what needs that can / should be addressed with the limited money and time available.*
- *Empathy from individuals with more knowledge*
- *Funding*
- *Training will be huge*

What (additional) support do you need to navigate your programmatic, policy, and systems change work through an equity lens?

# I would become more active in advancing equity, anti-racism, and inclusion within my department if...

*Action, implementation by the staff is needed.*

*We have support, but lack time, money, knowledge, prioritization, and we often lack the voices and feedback of those who would benefit the most from these initiatives.*

*I received training*

*I had more information, so I knew what to do*

# Is there anything else you would like us to know or that you would like to add?

*I have worked on it for years --attended meetings, discussions, equity teams, **not much to show for it.** This year, I was successful in appointing diverse citizens to various committees and hope it will help bring some changes. **Some hope here.***

*I look forward to working with you to tear down detrimental systems and to **build up better, mutually beneficial systems** in their place.*

*There is immense support for diversity, equity, and inclusion in terms of staff time dedicated and public statements that require very little change on the part of the City. However, very little real work has been done. **The real work begins with this plan.***



*Design thinking for inclusive, equitable, people-centered outcomes*

**[www.eqtbydesign.com](http://www.eqtbydesign.com)**

To: Middleton Strategic Plan Advisory Committee  
From: Public Administration Associates, LLC  
Date: Thursday, October 07, 2021  
Re: Middleton Strategic Plan – Organizational Structure & Financial Review

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Throughout the months of July and August PAA completed a site visit to meet with the City of Middleton's management teams to discuss staff and organizational needs within the City. Below is a summary of the organizational assessment based on those conversations. In addition, PAA completed a thorough review and evaluation of the city's finances. Findings of the financial review can be found in the following pages.

## A. City of Middleton Organizational Summary

The following is a PAA summary of comments by key members of the City of Middleton management team regarding the organization:

**To meet the goals of the city, department heads identified the need for increased or improved service or programming and related staff levels.**

**Communication** – Currently, individual departments are responsible for the identification and execution of internal and external communications. Departments often lack the staffing, communication techniques and strategies to be successful. The creation of a Communication Specialist position would allow for the coordination of city messages and identification of community audiences and outreach strategies. Funding for this position could be charged to CDD, Library and Tourism.

**Downtown Redevelopment** – As part of the goal to redevelop and maintain a strong downtown, the community has developed programming to attract resident and visitor traffic. In order to manage this programming more effectively, a part-time (possibly seasonal) Events Coordinator position is needed.

**Economic Development** – Due to staffing levels in the Community Development Department (CDD), there has not been enough bandwidth to tackle the economic development activities needed to grow Middleton's economy. Such activities would include business visits, developer attraction, and community marketing. Over the past 15 years, staffing levels in the CDD have not increased except for the addition of a sustainability-related position. A part-time or full-time position is needed to create an economic development initiative.

**Emergency Medical Services**-Middleton EMS is a lean operating organization and is part of a highly collaborative/integrated Dane County EMS System where there is no financial quid pro quo. No immediate staffing needs but if a larger EMS District (Middleton, Waunakee, Berry, Springfield and Westport) is considered in the future then staffing levels will need to be evaluated.

**Human Resources** – The recent creation of a Director of Human Resources position was unanimously supported by the management team. Part-time support staff and the use of technology would maximize the efficiency of the Director. Currently, support is provided by the City Clerk. Future goals of

the department are to create succession planning and retention strategies, training, creation of an onboarding program, purchase staff scheduling software, especially part-time and seasonal staff.

**Information Technology** – The Library has its own IT staff position. Making this position part of the IT Department would make service delivery more consistent.

**Pleasant View Golf Course**-An event planner position should be considered as current golf operations are at capacity. A teaching professional also could be added if deemed cost effective.

**Police**-According to both 2012 and 2018 commissioned police staffing studies, the department is not keeping up (i.e. 21 current police officers v. 2022 study recommended 27 police officers). Additional staffing would allow for more preventative community practices to take place. Genuine concern about safety of officers if not adequately staffed. The number of department mental health calls have risen significantly in recent years. Question whether additional community service officers could augment existing police officers in addressing this critical community need. Police dispatching is done in-house (only public safety agency in Dane County not centrally dispatched) but Middleton City Council wanted personal touch in providing this service.

**Public Lands, Recreation and Forestry**-800 acres of conservancy and almost 300 of active recreation land is currently managed by the City. The Middleton Park System in terms of acreage has doubled in the last 25 years and no park maintenance positions have been added during that time. There appear to be unrealistic community expectations as to the level that the community parks and conservancies should be maintained. While there are management plans they are not adequately funded, particularly for the conservancy areas. The 21 miles of community trails are not well maintained.

The Parks Division does not have full-time staff. In the past, maintenance was performed by correctional crews. Due to loss of correction crews, these responsibilities need to be assumed by city staff.

**Public Works**- Director is stretched very thin and position is currently very project-based to the detriment of time needed to address larger DPW management issues. Consideration should be made to separate project engineering/management from general DPW management (two positions). Community stormwater management is not being addressed as thoroughly as it should. A staff stormwater engineer position should be considered. Due to significant number of future retirements in department, succession planning should be a priority.

**Senior Center**-Growth of the community's 60+ population as well as the use of the facility and its programming continues to escalate. There are currently over 300 volunteers which augment the 5 FTE positions. The Volunteer Manager is part-time (20 hours per week) and should be full-time to maximize the use of this resource. The design of the facility (which is a former bank) is not ideal and the staff "fights the building everyday".

**To increase efficiency of service delivery, the organizational chart needs to be reviewed and possible reassignments of some functions be implemented.**

The functions of the airport and transit are currently managed by the Community Development Department. These functions may be more closely aligned with the Department of Public Works and its transportation mission. Providing staff support to the Airport Commission and Pedestrian, Bicycle and Transit Committee would be transferred to the Public Works Department.

**To increase organizational effectiveness, various strategies could be implemented.**

- Currently, the management team does not keep meeting minutes or make follow-up assignments. Timeliness and accountability for action items is inconsistent.
- Organizational silos are reducing overall organizational efficiency. These silos are reaffirmed during budget development as the process promotes competition rather than collaboration.
- Improved communication and development of trust would help move staff from a department-centric focus to an organization-centric, service-oriented focus.
- Due to lack of a strategic plan, the organization lacks objectives and non-budgetary metrics to identify action items.

**To improve governance efficiency, the number of committees, commissions, and authorities and their functions should be reviewed.**

The City of Middleton has 31 committees, commissions, and authorities. Some of these bodies have a very limited focus. In order to reduce staff time allocated to supporting them, a consolidation should be considered, or they should convene on an ad hoc basis.

**To improve operational efficiency, some facilities (particularly the City Hall, Pleasant View Golf Course and Senior Center) should be studied for possible improvements or replacement in the future.**

- The development of a Pleasant View CG Master Plan should be considered to encompass current and potential CG buildings/facilities as well as the future use of the lands to the north and the planned reconstruction of Pleasant View Road.
- The City Hall and Senior Center are not operationally efficient and space needs assessments of both facilities for possible renovation/replacement in the future should take place.

**Appendix : Summary of Department Evaluations**

**Department of Administration:**

Due to lack of correctional crews, park maintenance has suffered; additional street maintenance staff is needed; longevity pay was eliminated in 2021 budget with additional contribution to base wages; oversight and responsibility of communication should be delegated to recommended Communication Specialist position; Administrator has no assigned support staff

**Community Development Department:**

Broad mission with limited staffing levels; often reactive in dealing with community issues; economic development goals exist, i.e. marketing, developer attraction, and business retention, without related staffing to execute; departmental activities associated with the airport and transit should be relocated to the Public Works Department along with the related committee/commission

**Emergency Medical Services (EMS):**

Very impressive facility and high level of Paramedic-level services provided; lean organization; NE quadrant of the Madison Metro area is rapidly growing so will need to think more regionally in providing this service in the future-“think big and do what’s in the best of the greater good”; Good governance structure with three elected representative officials and three professional service providers; funding formula based on population and equalized values of municipalities served seems fair and equitable

**Human Resources Department:**

New department is appreciated by other departments; role and responsibility continues to evolve; good use of technology to improve efficiency of department – more needed; on-line application software is helpful; more funding for training is needed, possible increased use of free CVMIC training; need to review and update wage and compensation plan for better parity; need process to advance pay above midpoint; funding of merit program needed; process to evaluate position for pay grade adjustment is needed; need succession planning and employee retention strategies including related funding

**Information Technology Division:**

Well run department; was responsive to needs related to COVID-19 and remote working conditions; effective use of contractors, i.e., phone system and internet-related security to augment city staff; good management of technology hardware

**Library:**

Very high use by residents; planned Assistant Director position in proposed 2022 budget; older building has significant on-going maintenance needs which are currently addressed by contractors, no ongoing city maintenance performed; staff participates in ongoing DEI training; staff could benefit from more internal communication options to connect them to other city staff

**Public Lands, Recreation and Forestry:**

Very large and impressive parks (28) and conservancy areas (11 core) that are owned and maintained by the City; some athletic facilities are limited in their use (i.e. Middleton SC field at Firefighter’s Park); major concerns about lack of adequate funding for necessary park and, particularly, conservancy maintenance efforts; park fee structure should be evaluated; playground replacement fund is inadequate right now with 25 playgrounds to be maintained; no community center in Middleton

**Police Department:**

Impressive facility and well located; department is WILEAUG accredited (2014, 2017 and 2020) and only one of 42 police agencies in State so recognized-should be an on-going goal to maintain department accredited status; genuine concerns about maintaining adequate future staffing levels particularly for mental health-related calls as well as maintaining competitive officer wages and fringe benefits- falling behind Fitchbrg, Sun Prairie, Verona and Waunakee); City has been great in providing the capital resources to support the department’s mission

**Pleasant View Golf Course:**

The Golf Course has an on-going goal of netting \$200,000 per year from its operations; all existing debt associated with the Golf Course will be paid off in 2029; there is a definite need for the development of a Golf Course Master Plan that would incorporate needed facility expansion/upgrades as well as a

possible new “pavilion” for golf and non-golf (community) events; there will be a need for a Capital Reserve Study to determine what will be appropriate reserves in the future to provide for future Golf Course capital needs

**Public Works Department:** (Still to be Provided Pending Additional Site Visit)

**Senior Center:**

Very popular and appreciated facility in the community; demand for services and programming will continue to escalate; concerns about the ability to keep up with the technology needed to efficiently operate the facility; design of the Center is not ideal and this hurts staff efficiency; want to continue to meet accreditation standards of WI Association of Senior Centers and National Institute of Senior Centers

**Tourism Department:**

Well-run department; since 1998, operates as a city department rather than independent entity; in next three years, director wants to hire an office manager and marketing generalist to coordinate special events; more local venues needed to attract tourism, i.e. cross-country ski training center

## B. City of Middleton Financial Review

### FINANCIAL REVIEW

Based upon Middleton's Comprehensive Annual Financial Report (CAFR) for the fiscal year ended December 31, 2020, the city's finances are in very good condition. Essential to Middleton's fiscal health is its solid General Fund balance, high credit rating (Aa1 Moody's Investors Service), and modest use of its borrowing capacity.

#### Financial Planning

A key component of the city's financial planning process are the annual updates to its five-year capital improvement plan. This plan identifies capital needs for all the city's funds and lists priorities and financing sources.

The city will receive federal assistance under the American Rescue Plan Act in two equal payments in mid-2021 and 2022. Middleton has not determined its spending plan for the estimated \$2.1 million allocation.

#### Financial Policies

Middleton has adopted financial policies related to general fund balance, debt management, and budget development.

- **General Fund Balance:** The policy stipulates that unassigned fund balance should equal two to four months of the subsequent year's general fund budgeted expenditures (16.7 percent to 33.3 percent). At the end of 2020, the unassigned fund balance was 29.6 percent.
- **Debt Management:** At the end of 2020, Middleton had \$40,540,000 in outstanding debt or 19.7 percent of its legally available general obligation debt capacity. By comparison, city policy establishes a debt cap to not exceed 66.6 percent of its capacity.
- **Budget Development:** The 2021 budget is in compliance with the State of Wisconsin Expenditure Restraint Program and Wisconsin Levy Limit.

#### General Fund Financial Performance

##### A. Expenditures

Excluding transfers, Middleton's 2020 CAFR shows that public safety comprises 48 percent of expenses, public works is 21 percent, general government is 17 percent, leisure activities are 8 percent, conservation and development is 4 percent, and health and human services comprise 3 percent.

##### B. Revenues

Middleton's audited, actual adjusted revenues for 2020 show that taxes comprise the largest share of revenues at 63 percent, intergovernmental revenues at 13 percent, interdepartmental charges for services at 7 percent, other charges for services at 6 percent, licenses and permits at 5 percent, investment income at 3 percent, special assessments at 1 percent, and miscellaneous revenues at less than 1 percent.

Of the \$336,742 in COVID-19-related Route to Recovery funds received in 2020, \$298,818 was allocated to the General Fund. Room Tax decreased by \$500,928 over projected in 2020 and was the most significantly impacted revenue source.

Middleton, as compared to its Dane County peer municipalities, has one of the lowest property mill rates with \$5.65 per \$1000 equalized valuation. It also had the largest percentage decrease in mill rates (15%) over the past five years. The per capita property tax valuation is \$181,948, the highest in the county.

	<u>2015 Tax Year</u>	<u>2019 Tax Year</u>
<b>City of Stoughton (12,954 population)</b>		
Mill Rate	\$8.57	\$8.00
Tax Levy	\$7,914,654	\$9,383,714
Full Property Value (millions)	\$954	\$1,233
<b>Village of Waunakee (14,399 population)</b>		
Mill Rate	\$6.30	\$5.64
Tax Levy	\$9,061,712	\$10,884,476
Full Property Value (millions)	\$1,495	\$2,070
<b>City of Middleton (21,050 population)</b>		
Mill Rate	\$6.61	\$5.65
Tax Levy	\$16,386,140	\$17,985,016
Full Property Value (millions)	\$2,907	\$3,830
<b>City of Fitchburg (30,391 population)</b>		
Mill Rate	\$8.13	\$7.74
Tax Levy	\$19,769,244	\$23,733,085
Full Property Value (millions)	\$2,711	\$3,419
<b>City of Sun Prairie (35,895 population)</b>		
Mill Rate	\$8.28	\$7.21
Tax Levy	\$20,195,113	\$24,547,028
Full Property Value (millions)	\$2,566	\$3,634

**Special Revenue Fund Financial Performance**

Middleton has 14 special revenue funds: subdividers’ deposit, lost and damaged books, library gift, library endowment, next chapter, library, safety impact fee, economic development grant, tourism commission, police activities, EMS activities, public land activities, youth center activities, and senior center activities. Subdivider’s deposit, tourism commission and public land activities funds have the highest fund balances with over \$1 million each. Three funds had decreases in fund balance in 2020: next chapter, economic development, and tourism commission funds.

**Debt Service Fund Financial Performance**

Of the 2019 tax rate (to fund the 2020 budget) of \$5.65, Middleton allocated \$1.50 per \$1000 equalized property valuation toward annual debt service payment of approximately \$5 million. This compares favorably to the 2015 tax rate of \$1.73. With the impact of the Five-Year Capital Improvement Plan and related projected debt, the tax rate needed to pay \$7 million in annual debt service will increase in 2027 to \$2.00.

For the year ending 2020, the per capita general obligation debt was \$1,984 as compared to \$2,574 in 2016.

Currently 93% of the city's debt is scheduled to be paid within ten years.

### **Capital Projects Funds Financial Performance**

Tax Incremental District #3 Fund (created in 1993 and projected closing in 2030) accounts for property tax increments resulting from development activities and payments to developers as incentives from new development activities: Greenway Center area, the Discovery Springs, and the Downtown rehabilitation. Even after a subtraction of property from the TID boundary in 2020, TID #3 continues to be very successful with \$545 million in increment valuation as of January 1, 2021.

TID #5 Fund (created in 2009) accounts for property tax increments resulting from development activities and payments to developers as incentives from redevelopment between the Highway 12 and Parmenter Street corridors, the Allen Boulevard commercial area, as well as in Middleton's urban greenway. TID #5 had an incremental value of \$125 million and a fund balance of -\$990,605 as of January 1, 2021. Several projects are currently under construction and are expected to add significant value. City officials project that TID #5 will have a positive fund balance by 2026.

The General Capital Project, Public Works Capital Construction, and Public Lands Capital Construction have a combined fund balance of \$2.2 million. Revenues for these funds are mostly generated by the annual sale of general obligation notes.

### **Enterprise Funds Financial Performance**

Middleton has six enterprise funds: Water Utility, Sewer Utility, Pleasant View Golf Course, Stormwater Utility, Middleton Utility District and Airport Fund.

In 2020, the Water Utility had operating revenues of \$2.7 million and an operating income of \$704,261. The last water rate increase became effective September 2018. Currently, the Wisconsin Public Service Commission is reviewing a city-requested rate increase with an effective date of 2022.

In 2020, the Sewer Utility had operating revenues of \$2.9 million and an operating loss of \$168,774. The city contracts with the Madison Metropolitan Sewerage District for sewage treatment. The last sewer rate increase became effective December 2020 and is projected to increase revenue by in \$574,272 in 2021.

With operating revenues of \$3.2 million in 2020, the Pleasant View Golf Course had an operating income of \$1 million.

In 2020, the Stormwater Utility had operating revenues of \$861,325 and a net operating income of \$387,873. As of December 2020, the Utility had no outstanding revenue bonds. The last stormwater rate increase became effective April 2019.

In 2020, the Airport Fund had operating revenues of \$134,833 in 2020, and an operating loss of \$37,809.

In 2020, the Middleton Utility District had no operating revenue and an operating loss of \$2,085.

### **Fiduciary Fund Financial Performance**

The Middleton Fire District provides comprehensive fire-related services to the city and three area towns. Each entity contributes a pro rata population-based contribution to the district. Over 100

volunteers provide the primary staffing resources to the district along with six full-time, paid staff. In 2020, the Fire District had a net position of \$52,526.

To: Middleton Strategic Plan Advisory Committee  
From: Vandewalle & Associates  
Date: Thursday, October 07, 2021  
Re: Middleton Strategic Plan – Vision Panel Summaries

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From September 15<sup>th</sup> through September 23<sup>rd</sup> the Middleton Strategic Plan consultants held a series of topic-based Vision Panels, including Local Businesses & Business Groups, Education, Underrepresented Communities, Community Influencers, Community Youth, and Seniors.

Below is a summary of themes that emerged from each Vision Panel. You can find the full vision panel summary and list of participants invited to each Panel in the following pages.

## Vision Panels – Summary of Key Themes

### A. Local Businesses & Business Groups Vision Panel

- City and business community have excellent, mutually supporting relationship.
- City is attractive location for businesses and employees, but lack of affordable housing makes it difficult to attract service workers in particular.
- Downtown becoming more and more vibrant – business parks need a greater mix of support businesses (e.g. coffee shop and lunch businesses).
- City staff is great to work with but would benefit from full time economic development professional.
- Council and committees need greater awareness of the stress and cost of the development approvals process on developers and businesses

### B. Education Vision Panel

- Schools are strong and key attractor of residents to the City.
- City and school district have an excellent relationship and there are more opportunities and needs to work together along with the business community.
- The “Good Neighbor” motto is genuine – need to capitalize on that to create a larger community conversation about the value of and need for more inclusivity.
- Lack of affordable housing and transportation are deterrents to attracting families and staff.

### C. Seniors Vision Panel

- City is very supportive the senior community needs. Senior center’s location and focal point for all resources is appreciated.
- City and Council communication could improve with a multi-platform and multi-lingual communication approach (print, online, nextdoor, social media, etc.) and a weekly summary or “digest” of what’s happening in the City.
- Transportation system could improve by closing the gaps in the sidewalk network, shifting towards universal design, and improving the transit system to better serve transit dependent populations.
- Affordable living options close services are needed for seniors to age in place.

#### **D. Community Youth Vision Panel**

- Strong sense of community, accessible and vibrant downtown, strong school district, variety of great local businesses, parks, lakes, and variety of recreational opportunities were identified as great assets.
- City needs a central community center for youth to gather in. Very few things for teens to do in Middleton because of the lack of programs, services, facilities, and staffing.
- City could increase its communication with youth by better utilizing existing avenues such as parks, YMCA, schools, daycares, and other organizations with after school programs.
- Committees should be more representative of the community and committee appointments should not all be in the hands of one person.

#### **E. Community Influencers Vision Panel**

- Middleton's small-town feel; sense of community and history; schools; diversity and unique character of the neighborhoods and houses; robust parks and natural areas; and city services were identified as great assets.
- City communications could be more streamlined.
- City does a good job at managing its finances and appreciate hiring the new HR director; however, they see that City staff is stretched thin and will need to hire more staff to continue providing the level of service it does.
- Public transportation and mobility for all is needed.
- Need for more diversity, equity, and inclusion in City government, staff, and committee members.



## Underrepresented Vision Panel Key Findings

*September 15, 2021*

### Community Identity + Assets

- Participants identified safety, Middleton’s “small town feel,” open spaces, and friendly neighbors as **key community assets**.
- There is an opportunity for the City to **improve commuter access** for residents outside the city center. Participants mentioned outlying areas don't have access to grocery stores and other day-to-day necessities.
- The majority of participants mentioned they often **don’t know what resources are available** in Middleton, and if they do want to learn more about available resources, it requires extensive research from residents (i.e. no one-stop-shop available to the general public).

### City Governance

- Participants emphasized the need for the City to create a **permanent staff position, as well as develop a City-wide strategy**, to address issues around equity, anti-racism, and inclusion.
- In regards to what the City did **very well** this year, participants highlighted the City’s commitment to proceed with committee meetings despite COVID. In addition, they noted that schools did a great job supporting families and children with much needed resources (i.e. school supplies and donations).
- Participants would like to see **increased funding to support City transportation** needs, in addition to an **increased City presence** in BIPOC communities.



## Accommodating Future Growth

- Participants want to ensure any initiatives centering future growth **do not overshadow key community assets** (e.g. safety, Middleton’s “small town feel,” open spaces, friendly neighbors, bike paths, current street configurations).
- There are opportunities to **develop residential housing with multiple stories** to better accommodate the City’s challenges with outward expansion, as well as provide more housing options for residents.
  - In doing this, participants emphasized the need to **ensure housing options have ample outdoor and indoor space** (versus paying high amounts to “live in a small box”), as well as remain affordable.

## Sense of Community + Future Hopes

- Participants were **optimistic about the City’s commitment to anti-racism work** and creating a more equity-centered environment for all City residents.
- Participants are concerned about having to move out of Middleton due to **increased housing costs** in search of more affordable housing options in surrounding areas.
- Participants again reiterated that they wanted to **maintain** Middleton’s “small town” and “friendly neighborhood” feel!

## A. LOCAL BUSINESSES & BUSINESS GROUPS VISION PANEL

### Vision Panel Invitation List (✓ = attended Vision Panel discussion)

- |   |   |
|---|---|
| ✓ Deana Porter, Broadwing Advisors, Middleton Chamber of Commerce, MADC | ✓ Jade/Matt Hofeldt, Capital Flight               |
| ✓ Kate Miller, Middleton Chamber of Commerce                            | ✓ Dick Titus, ETC                                 |
| ✓ Andrea Van Nest, Downtown Middleton Business Association              | ✓ Seth Nicholson, Bruce Company                   |
| ✓ Jon Denissen, PPD Laboratories  | • Julie Peterman, Middleton Tourism               |
| ✓ Camille Carter, Madison Black Chamber of Commerce                     | • John Livesey, Livesey Company                   |
| ✓ Cory Mace, Badger Bus, Middleton Tourism Chair                        | • Jose Garcia Pino, Hubbard Avenue Diner          |
| ✓ Corey Kautzky, Greenway Station/RED Development                       | • Dongxia Li, Juno Wellness Massage & Acupuncture |
|   | • Jessica Cavazos, Latino Chamber of Commerce     |
|   | • Jason Rae, Wisconsin LGBT Chamber of Commerce   |

## SUMMARY OF DISCUSSION

### Community Identity + Assets

- Strong sense of community amongst businesses and overall feeling that City and Chamber are highly involved and very supportive of the business community.
- Middleton is a very attractive community, making it easy to recruit talent. The City has many of the quality of life amenities people look for, including diversity of restaurants and activities, recreation and access to nature with Pheasant Branch, great school district, retail shopping with Greenway Station, and a vibrant and quaint historic downtown but with the small-town feel.
- Location and accessibility to University Avenue and Beltline is a big asset to the business community.

### Business Climate

#### *IMAGE + EXPERIENCE:*

- All businesses really praised and appreciate City staff's engagement and relationship with the business community. Participants shared that they appreciate how the City is sensitive in their decision making and how it impacts local businesses.
- Great relationship with police and fire departments – leadership and staff – work very cooperatively with local businesses.
- City's response to the flood and COVID response was recognized and appreciated. City listened to small business concerns, they stayed engaged, and the CDA helped bring activities to the downtown and helped bring businesses to the front and center.

#### *OPPORTUNITIES FOR IMPROVEMENT/SUPPORT:*

- Better link the importance of downtown businesses to tourism activities that draw people to hotels.
- Make it easier for non-traditional businesses such as food trucks to locate in areas that are too far from food options such as business parks. Currently, fees are too high for food cart owners.
- Create a partnership with local restaurants and larger businesses to bring food on site because many restaurants are struggling to rebuild their lunch business.

- Create a permanent position for an economic development professional staff person that serves as a customer service role and works with the business community and developers (making sure that existing businesses know how to grow here, share resources that exist, and assist with locating here). Many participants felt that City has a lot of resources for small businesses but could do a better job of communicating those resources.
- Create a mentorship program between big business and small businesses to support and learn from each other.
- Participants discussed various opportunities to help downtown. Parking downtown is not well understood. Better wayfinding, communication, and signage to direct people to those existing parking is necessary. Participants also shared that there needs to be more assistance for downtown small businesses during the winter months when there is less traffic.

## Workforce Support + Retention

### *WORKFORCE ISSUES/CHALLENGES*

- Lack of affordable housing and of lack bus services are challenges.
- Rent for downtown businesses is high, restaurants in particular are increasing their wages to attract workers, while their business is still not back to normal. Ability to attract workers has always been hard but coupling that with affordability to live in Middleton makes it more difficult to attract workers.
- Business parks need to be more mixed-use to provide walkable employee support services (coffee shops, restaurants, etc.). Will promote employee recruitment and increase collaboration amongst employees.

## Development

### *EXPERIENCE + OPPORTUNITIES FOR IMPROVEMENT*

- Participants agreed that City staff is great to work with on development projects – they listen and are creative at problem solving.
- City will need to be more proactive in communicating the need for infill development so community is prepared when proposals come to the table. There is a sense that there needs to be a better understanding within the broader community that infill development is going to happen if we want to grow our tax base, continue to have lower taxes, and build places for employees to live.
- Council and some of the Committees can be a challenge when going through approval process causing delays, which can be very costly.
  - Participants suggested the economic development professional staff person could also help educate the Council and the committees about projects and how projects will advance city goals.

## B. EDUCATION VISION PANEL

### Vision Panel Invitation List (✓ = attended Vision Panel discussion)

- ✓ Jill Gurtner, Clark Street Community School
- ✓ Dom Ricks, Kromrey Middle School
- ✓ Kate Sargent, Madison Community Montessori School
- ✓ Peg Shoemaker, Middleton High School
- ✓ Dana Monogue, Middleton-Cross Plains Area School District (MCPASD)
- ✓ Nicole Sandoval, MATC
- ✓ Bob Hasselbein, MCPASD
- ✓ Percy Brown, MCPASD
- ✓ Chris Dahlk, Sauk Trail Elementary School
- Meredith Pucci, Westside Christian School
- Emily Nestingen-Palm, Middleton High School
- Evelyn Lasky, Madison Day Country School
- Daphne Wu, Sustainability Committee
- Srija Katukam, Arts Committee

## SUMMARY OF DISCUSSION

### Community Identity + Assets

- “Good Neighbor City” is taken seriously and extends across intergovernmental bodies/agencies.
- City provides great support for the school district, including the recent school referendum, and on equity initiatives undertaken by the school district. Participants also appreciated the inclusion of student voices in governmental committees.
- Participants viewed the accessibility of amenities, family-owned businesses, opportunities for young children including childcare and playgrounds, walkability and bikeability for families, the strong education system, and the overall sense of a family-oriented town as all great City assets.
- Focus on sustainability within the City and the industries that exist in the City was viewed as an asset.
- Participants shared that there’s a sense that the people who live in the City don’t reflect the perception that others have of the City, particularly around the issues of race and class, and voiced that the City can do a better job at expressing that and really centering the “Good Neighbor” motto to reflect the City.
- Participants shared that there’s been a lot of efforts from the City and the community to validate diversity and to continue to support it. However, there’re opportunities for improvement to ensure diversity is represented in City government and ensure those who live in Middleton also see themselves reflected at the decision-making table.

### Projects + Initiatives

#### *PROJECTS AND INITIATIVES YOUR SCHOOL IS WORKING ON:*

- Middleton High School: redesigning projects to better engage students and working with business and community partners. Three new large learning designs include:
  - Green Academy – environmental justice team. Will look for City partners to support this work. Created around a theme or problem they are attempting to solve.
  - Hip-hop Co-op – have wellness, English, social studies, and music tied together with standards imbedded in hip-hop culture. Game Design and Development – tying together three content areas.
  - Working with MATC on beginning teachers course pathway and their fire academy program.
- Middleton-Cross Plains Area School District: working on five key initiatives from the equity and student achievement perspective, including: 1) literacy proficiency for everyone 2) critical

thinking alongside literacy 3) civic engagement 4) sense of belonging 5) cultural competence with global mindset.

- Clark School: continue to build meaningful connected educational opportunities. The City's continued commitment to being connected to schools and listening to the voices of the young people has been a great opportunity and want City to continue being engaged.
- Kromrey Middle School: goal is to be a 21<sup>st</sup> century school, which means inclusion of all students and needs to be at forefront of planning. Currently working on Spanish/English two-way emersion program and integrating student identity (from ethnicity to atypical gender identity) in school culture in a meaningful way.
- Madison Community Montessori School: at 160 students and will raise that 190-210 students. Committed to equity and diversity and have introduced it into their curriculum and professional development. Have expanded Spanish curriculum and literacy for dyslexia and dysgraphia.
  - Bus route or bike trail on Airport Road can help alleviate parking issues and congestion, especially as they continue to grow.
- MATC: have many dual credit programs. Presenting information about existing programs to students early on so they are aware of these opportunities is key.

#### *CHALLENGES SCHOOL FACES TO ACCOMPLISHING PLANS/INITIATIVES:*

- Affordable housing for educators and families is a challenge. Need to make it economically feasible for ALL to live and thrive in Middleton.
  - There's a strong commitment to be a "good neighbor" but economic reality of community sets it up to not live that.
  - A lot of parents' struggle finding adequate "permanent" housing – making sacrifices for kids to be in school district but not sustainable.
- Very vocal minority of long-time residents in the community feel like the equity work the school is doing is new, even though school has been doing it for over a decade.
  - There's an opportunity for the City to double down on the language that really makes the community "good neighbors" and goes beyond tolerance – it's the type of language that only strengthens the school's work.
- Schools are going to face funding challenge in the long-term. In order to execute on some of the programs, it will require assistance from the City such as internships in City government and helping schools' partner with industries.

### **Programming + Services**

#### *CHANGES/ISSUES CITY NEEDS TO BE AWARE OF/PREPARED FOR:*

- Participants expressed that the City needs to look at who's at the decision-making tables and whether it reflects the make-up of City and school district. If people aren't represented, then there's an opportunity for the City to assess what can be done to include those voices at the table.
- Sense that perception of "Good Neighbor" is more important than lived reality of residents. Participants shared that there needs to be a deeper commitment to hear from the voices for whom it's not better here or whom are not welcomed/can't be here because of the limitations of housing, transportation, and health services.
- Schools are seeing an increased resistance to equity work and doing more for more diverse groups of people. There's a lack of understanding within the community on things such as preferred gender pronouns. Not enough community conversation around these issues. Need to

create a forum to allow people to ask questions and increase understanding without them feeling defensive and attacked.

- Schools are seeing an increasing number of neurodiverse students with different needs and have more people interested in non-traditional educational opportunities.
- Equity work lessons learned from the school district:
  - Can't have an opt-in option, you have to do it in unity and not just have one leader do all the work.
  - Really center the community around a set of shared beliefs.
  - Raise up the stories of people in the community and their individual experiences – make it real and personal.

*OPPORTUNITIES FOR BETTER COORDINATION/COMMUNICATION:*

- Participants suggested that it will require creative solutions to engage with the diverse voices of the community such as working with landlords that can then incentivize their tenants to participate in community surveys and other engagement mechanisms.
- Partnership between the school district and the City to have conversations around equity and inclusion through public forums (such as “One City One Book”) or other ways to raise social consciousness about the realities of what is really happening within the community.
- Partnership with Middleton Equity Connection.
- Kromrey partnered with Luna Arts, which provided applicable learning model for students tied to real life context. This is a model that can be applied at a larger scale in the City.
- School district shared that there's an opportunity for the City to consider a shared health and wellness clinic for staff between the school district and the City.
- School district extends beyond the City of Middleton, with Middleton feeling like the 800-pound gorilla in the room. There's an opportunity for the City to connect with these other communities to forge partnerships and honor their perspectives.
- Focus on a small number of things to maximize impact.

## C. SENIOR VISION PANEL

### Vision Panel Invitation List (✓ = attended Vision Panel discussion)

- |   |   |
|---|---|
| ✓ Peg Martin, Commission on Aging   | ✓ Bonnie Verberkmoes, Former Chair, Commission on Aging                   |
| ✓ Dennis Dorn, Past Plan Commission Member, Past Library Board              | ✓ Jill Kranz, Former Senior Center Director                               |
| ✓ Paul Nelson, Retired Dane County Board, Former Middleton Library Director | ✓ Richard Brye, Resident  |
| ✓ Stacy Austin-Li, Dementia Friendly Middleton, Commission on Aging         | • Holly Hatcher, Dane County Board of Supervisors, District 26 Supervisor |
| ✓ Tammy Derrickson, Senior Center Director                                  | • Jean DeVore, Resident   |
|   | • Peggy Maren, Resident   |
|   | • Gladys Simon, Resident  |

## SUMMARY OF DISCUSSION

### Community Identity + Assets

- Participants felt the City has been very supportive of the needs of older adults and appreciate the central location of the senior center and how it serves as the focal point for all resources.
- Accessibility to services is difficult for residents who can't drive, which means people have to rely on volunteers from senior center. Transit system could be improved to better connect people to services.
- Participants identified walkability, the diversity of assets such as schools, retail, and restaurants, the friendliness and neighborly attitude, open spaces for walking and exercising, and City's care for the environment and accessibility for all, as key assets in Middleton.
- "Good Neighbor City" attitude is exemplified in the partnerships across organizations, city departments, and local businesses. Opportunity to build on this.
- Participants shared there's an opportunity to shift toward creating more a walkable and bikeable City with attention towards universal design and consideration of neurodiversity in all spaces.
- Opportunity for street infrastructure improvements such as improved connectivity in sidewalks, bike paths, wider sidewalks, etc.

### City Governance

#### *POTENTIAL MECHANISMS TO IMPROVE CITY COMMUNICATIONS & AWARENESS OF RESOURCES*

- Participants shared that senior center provides a lot of great resources and programs but many either don't take advantage of it or don't understand all that it provides.
- Participants suggested the communications from City needs to be multi-platform (print, online, nextdoor, social media, etc.) and multilingual. Many mentioned the school referendum as a good example of City communication efforts.
- City's email subscription is helpful; however, some find the amount of information overwhelming and suggested a weekly summary or "digest" of what's happening in the City would be more helpful.
- Use non-traditional mechanisms such as laundromats to reach different audiences.

#### *FUNDS & RESOURCES*

- Participants felt like the City has been very generous with the senior center but there could be creative ways for how that's structured. Senior center created an endowment fund with Madison Community Foundation, which will allow center to create more programs.
  - Funding for senior center is appropriate for existing senior population.
- Senior center maintains a great array of partnerships throughout the city and Dane County – maintaining these are critical.

### **Accommodating Future Growth**

- Participants expressed that future growth direction of infill development is not an issue, main concern is overall affordability and ensuring proximity to services is important when planning for projects.
- Affordable options are needed for seniors and people in fixed income to stay in the community and be able to age in place. Housing is a constant issue that Senior Center case managers are dealing with.
- New housing developments should be affordable, incorporate universal design, accessibility and ensure they are walkable or close to basic services such as groceries.

## D. COMMUNITY YOUTH VISION PANEL

### Vision Panel Invitation List (✓ = attended Vision Panel discussion)

- ✓ Erin Summer, Arts Committee
- ✓ Alex Joers, Dane County Board of Supervisors District 9
- ✓ Gabrielle Hinahara, Middleton Youth Center
- ✓ Monique Carlin, Wisconsin Youth Company
- Adam Cummings, Commission on Youth
- Joanna Rolden, Middleton High School
- Maddox Lee, Middleton High School
- Leif Hubbard, Girl Scout/Boy Scout
- Simrnjit Seerha, MCPASD School Board
- Aishani Das, Middleton High School
- Sandy Morales, Big Brothers Big Sister Dane County
- Patrick Donovan, Madison4Kids
- Alondra Quechol, Centro Hispano

## SUMMARY OF DISCUSSION

### Community Identity + Assets

- Participants identified the community's personality, it's residents, accessible and vibrant downtown, strong school district, variety of great local businesses, and parks, lakes, recreational opportunities as all great assets.
- City could do a better job at promoting its parks and recreation assets with outside youth groups and organizations so they too can take advantage of these assets.
- Community lacks opportunities for teens to do things and overall lacks a community hub/community center for youth to gather in. In addition to the lack of facilities, staffing is an issue at the Youth Center and with recreational programs.
- New developments could integrate programming for families and offer more flex spaces so there's an increase in spaces for families and kids to use.

### City Governance

#### *POTENTIAL MECHANISMS TO IMPROVE CITY COMMUNICATIONS & AWARENESS OF RESOURCES*

- Participants felt like folks are generally informed and City has a lot of information electronically, but there are more opportunities to connect with young people and to get them actively involved in projects.
- City could use parks, YMCA, schools, daycares, and other organizations with after school programs to get information out in hard copy flyers.

#### *PERSPECTIVES AROUND ISSUES OF EQUITY, ANTI-RACISM, AND INCLUSION*

- City needs more emphasis in engaging with a more diverse communities across city departments and committees.
- Committees need to be more representative of the population. There's an opportunity to improve participation in committees by addressing childcare, transportation, and various access issues. Overall, making it known that there are opportunities to serve on committees needs to be significantly improved. Potential ways to better advertise committee opening to youth and others include:
  - YouTube ads, billboards, schools (announcements, coaches, social workers), TikTok, social media, Instagram, large events/highly attended events like the Good Neighbor Festival with booth or signs/ announcements from stage.

### *PROGRAMS + SERVICES*

- Participants shared that downtown programming and events throughout the summer were a positive for the community. They appreciated the City's response to COVID and ensuring programs were open, running, and accessible for youth.
- Opportunities to engage with non-profits that could be making use of city parks and other recreational facilities.
- Need to have city services and information available in multiple languages, especially for the facilities located in areas with high concentrations of diverse populations and non-English speakers.
- Participants echoed that there's a need for a better represented balance on committees and not have it all be in the hands of one person.
- Need for a community center for young people to gather. Schools gyms and facilities are fully booked, therefore there's very little space for the youth.

### *FUNDS + RESOURCES*

- Participants shared that City recreation programs are good but limited and costly. There's an opportunity to create a fund to open spots in each program for those who are under hardship. There could be discounted spots/sponsored spots to allow all youth to participate in the same activities. Would like to see more funds for scholarship programs as well.
- More supportive afterschool programs, space, and staff is highly needed.
- Would like to see more resource redirected from law enforcement budget to more preventative community- based programs.
- Opportunities for the City to leverage local businesses and partner with local businesses to volunteer their space for youth programming and on internships/mentorship to help youth explore what they are interested in while helping businesses address needs.

### **Accommodating Future Growth**

- Future development projects should be planned to be accessible to parks and assets and more greenspaces / community spaces should integrated into multifamily developments.
- Improved public transit in the community to help with affordability and also help youth get around.

## E. COMMUNITY INFLUENCERS VISION PANEL

### Vision Panel Invitation List (✓ = attended Vision Panel discussion)

- |  |   |
|--|---|
| ✓ Spencer Schumacher, Realtor                                | ✓ Curt Fuszard, Resident                                      |
| ✓ Lisa Janairo, Chair of Sustainability Committee            | ✓ Ginny Corwin, Middleton Beach Road Neighborhood Association |
| ✓ Doug Swank, Former Mayor                                   | ✓ Laura Crow, Middleton Community Church                      |
| • Lloyd Eagan, Resident                                      | ✓ Molly McDermott, Middleton Community Church                 |
| ✓ Ken Potter, UW-Madison                                     | • Joel Fait, EMS Commission                                   |
| • Roshelle Ritzenthaler, Community Campus Planning Committee | • Edgar Spalding, UW-Madison                                  |
| ✓ Courtney Ward-Reichard, Good Neighbor Festival             | • Megan Diaz-Ricks, Resident                                  |

## SUMMARY OF DISCUSSION

### Community Identity + Assets

- Vibrant and healthy business community because of the great support from City staff, Chamber, MADC, and the school district.
- Connected and integrated downtown with the community and its position as a destination for locals and others.
- Middleton's small-town feel, sense of community and history, schools, diversity and unique character of the neighborhoods and houses, but with connection to a larger metro area were all identified as great assets.
- Good neighbor motto as Middleton's identify but with opportunity to develop it more.
- Parks, lakes, Pheasant Branch, natural areas were all identified as assets but with the opportunity to be enhanced with better access to the lake and conservation of Pheasant Branch as a more of a natural area.
- Participants identified City services such as public safety, library, and senior center as assets that are appreciated.
- City's sustainability efforts are also appreciated.

### City Governance

#### *POTENTIAL MECHANISMS TO IMPROVE CITY COMMUNICATIONS & AWARENESS OF RESOURCES*

- Participants felt there are opportunities for improvement in the City communication efforts. They appreciate that you can sign up for information; however, the information is overwhelming a lot to sift through to find Council decisions.
- Senior Center Newsletter is a good communication example.
- Helpful mechanisms for communication suggested were handouts that goes to school kids in their backpacks like it they used to; a radio station like Monona has; better promote the monthly micro group hosted by Chamber on City government issues; more use of social media by Council members and City government to inform the public of issues that will be on agendas.
- Participants also shared that they don't always know when and how input is wanted by Council and City government.

- In terms of City department collaboration, there was a feeling that the City is too siloed and it could improve communication amongst City departments to work better together and advance City goals in a unified manner.

#### *PERSPECTIVES AROUND ISSUES OF EQUITY, ANTI-RACISM, AND INCLUSION*

- Participants shared that there's a need to improve transportation within the City.
  - Public transportation service and infrastructure is needed to create accessibility to those without cars, reduce parking, and be tied to new developments.
  - Alternative modes of transportation such as biking also needs to be seriously considered as part of a multi-modal transportation system and to address the last-mile issue.
  - Handicap-accessible busing need to be citywide because not everyone is being served.
- Increased support from the City on the school district's diversity and inclusion initiatives to help counter the pushback they are receiving.
- Participants shared that they would like to see more diversity, equity, and inclusion in City government, staff, and committee members. There's a sense that the communities of color and low-income populations are invisible in the City.
- Current committee process of appointment and structure is not welcoming to people of diverse backgrounds and continues to be a significant problem. Committees need to be more representative and reflect the actual community make-up.
  - There needs to be more efforts to engage with diverse populations and meet them where they are at to recruit committee participants such as having a booth at Lakeview Park.
  - Committee process is a mystery in terms of how people are chosen, their qualifications, their authority, etc.
- Need to move translation button for website to the top of the page to make it highly visible, not at the bottom of the page.
- Need to do better and more to truly live the Good Neighbor motto.

#### *PERFORMANCE & SERVICES*

- Participants shared the Comprehensive Plan, Stone Horse Green as a greenspace, economic relief program for local businesses, and transparency of the airport planning are few things the City did very well this year.
- Would like to see Stone Hone Green to stay as a central greenspace like it is today.
- Participants would like to see more programming and services for youth, sustainability as every department's responsibility, and as Middleton continues to grow, working better with adjoining communities.

#### *FUNDS + RESOURCES*

- Participants acknowledged that the City does a good job of managing its finances and appreciate hiring the new HR director; however, they see that City staff is overworked and they will need to hire more staff to better serve the community.
- Participants expressed that the City and business community need to elevate discussions with state legislature to reform levy limits to be able continue doing the things that are needed for the community.
- City could partner and encourage relationship with nature organizations to help maintain and improve the community's natural assets.

- Better collaboration with the other municipalities in the school district to move and grow in similar directions.

### **Accommodating Future Growth**

- Majority of the participants agreed that growing up is the right approach but it needs to be done with a focus on sustainability, low-impact development, more affordable ownership opportunities, and integrate more greenspaces with new developments.
- Various areas of development opportunity exist along University Avenue and Allen and Century to continue building our employment base and create places and spaces to expand and build wealth in the community.
- Some participant expressed concern that infill development will increase flooding risk due to state rules.

## Introduction

The asset and economic opportunity analysis summarizes analysis Middleton's existing plans and initiatives as well as discussions with staff, elected officials, and vision panels to identify and describe community assets that help define the City as well as ten opportunities for future growth and advancements of the City's values and priorities.

## Assets

The City of Middleton's strongest assets and defining characteristics are described below:

**Regional Location** Middleton's location and position in the region make it accessible to larger metro-areas while keeping its small-town feel.

**Good Neighbor City** the City has a community-focused culture as the Good Neighbor City that is seen and felt by its residents and visitors.

**Transportation and Access** its transportation connectivity and accessibility to region make Middleton an easy place to get around.

**Public Safety** its commitment to public safety is valued by residents and prioritized by City leaders.

**Schools** high quality schools that attract bring new people to the community and serve its residents and families.

**Economic Diversity** Middleton's economic diversity and varied tax base, which includes business and employment centers, helps make it more resilient and less reliant on property tax revenues like more residential-oriented communities.

**Recreation & Greenspace** Middleton is defined by its recreation, greenspace, and natural amenities, including the Pheasant Branch Conservancy, these assets contribute to Middleton's high quality of life.

**Historic Downtown** Middleton's historic downtown is a vibrant economic core that sets Middleton apart from other Dane County communities, making it a regional destination.

## Economic Opportunities

The following is a summary of a high-level economic opportunities that represent potential economic and community drivers for the future.

### Excursion Rail to Downtown Madison

- Create train routes that connect to destinations like sports, music and entertainment venues
- Connect Middleton hotels to Downtown Madison to make Middleton a choice of visitors to the region
- Opportunities for partnerships, like hotel guests receive a free train ride to Camp Randall

### Infrastructure for Continued Airport Safety Compliance

- Continue to make improvements to maintain airport safety compliance and keep it a modern, functional facility
- The airport serves diverse users, including hobby, business, flight education, medical transport. Investments are needed to keep the airport safe and functional for these groups

### Implement the North Mendota Parkway

- The North Mendota Parkway will allow regional traffic to circulate outside of the City limits, relieving congestion within the City
- Increasing Middleton's accessibility and connectivity by moving regional traffic around the northside of the metro area

### Continue to Invest and Value Sustainability

- Continue to work and invest toward becoming a renewable energy powered city
- Implement City projects that reduce the impacts of climate change
- Invest in public infrastructure that advances these goals, including EV Charging and solar
- Identify and plan for Battery Storage Districts that build resiliency in Middleton's energy system

### Be a Leader in Stormwater Management

- Middleton is located at the north end of the Chain of Lakes, giving it a critical position in the regional water system
- Expanding the greenway will increase Middleton's ability to address and mitigate future stormwater issues and adverse rain events
- Installing new stormwater detention areas upstream will expand the capacity of the stormwater management system

### Integrated Mass Transit

- Bus Rapid Transit and completion of a Phase 2 study represents an opportunity to improve public transit access in Middleton
- Current bus service with Madison Metro, can be improved over time as Middleton densifies, expanding and increasing existing bus routes
- Future-oriented mobility options, including Autonomous Loopers, can solve "last mile" connection issues by linking neighborhoods to transit
- Improved mass transit can connect employees to job locations as well, removing transportation barriers to employment opportunities

### Infill Growth and Missing Middle Housing

- As housing prices increase, expanding owner-occupied attached housing options can increase the diversity of housing options and Middleton and increase housing accessibility
- Given limited areas for residential growth beyond the City's current boundaries, infill and redevelopment opportunities will be the main source of residential growth
- Increased housing options at a variety of price points will address the missing middle of housing options

### Grow High-Tech Companies

- Continue to attract high-tech companies offering quality jobs
- Develop a job incubator with educational connections to school district to expand the workforce development pipeline
- Encourage and foster entrepreneurship to further diversify the City's employer base and expand economic opportunities for residents

### Growth Through Inclusion and Diversity

- The City of Middleton has taken numerous steps to prioritize diversity and inclusion in the City and have raised it as a key value
- The City should look for opportunities to increase the diversity of resident participation in City communities, commissions, and elected offices
- Increasing diversity in the City workforce will ensure that the City's departments better represent the resident population

DRAFT



# Regional Assets & Opportunities

## MIDDLETON STRATEGIC PLAN

Middleton, WI

**DRAFT**

### Existing Assets

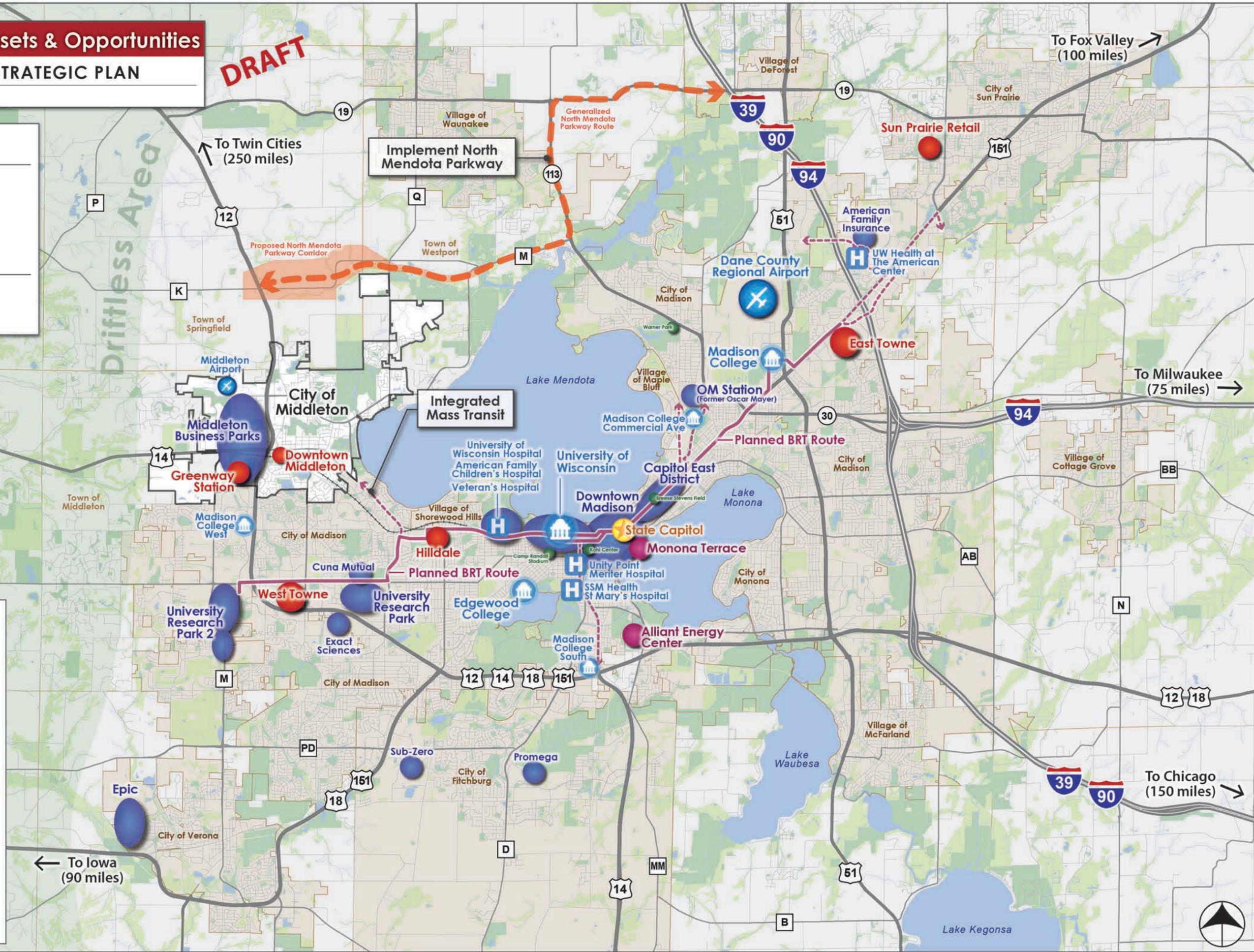
- Regional Location
- Transportation & Access
- Economic Diversity

### Future Opportunities

- North Mendota Parkway
- Integrated Mass Transit

### Legend

- Airports
- Hospitals
- Universities/Colleges
- Gathering/Venue
- Major Employment Centers
- Shopping Destinations
- Major Sports Venues
- Open Space
- Environmental Corridor
- Water
- City or Village
- Township





# Community Wide Assets

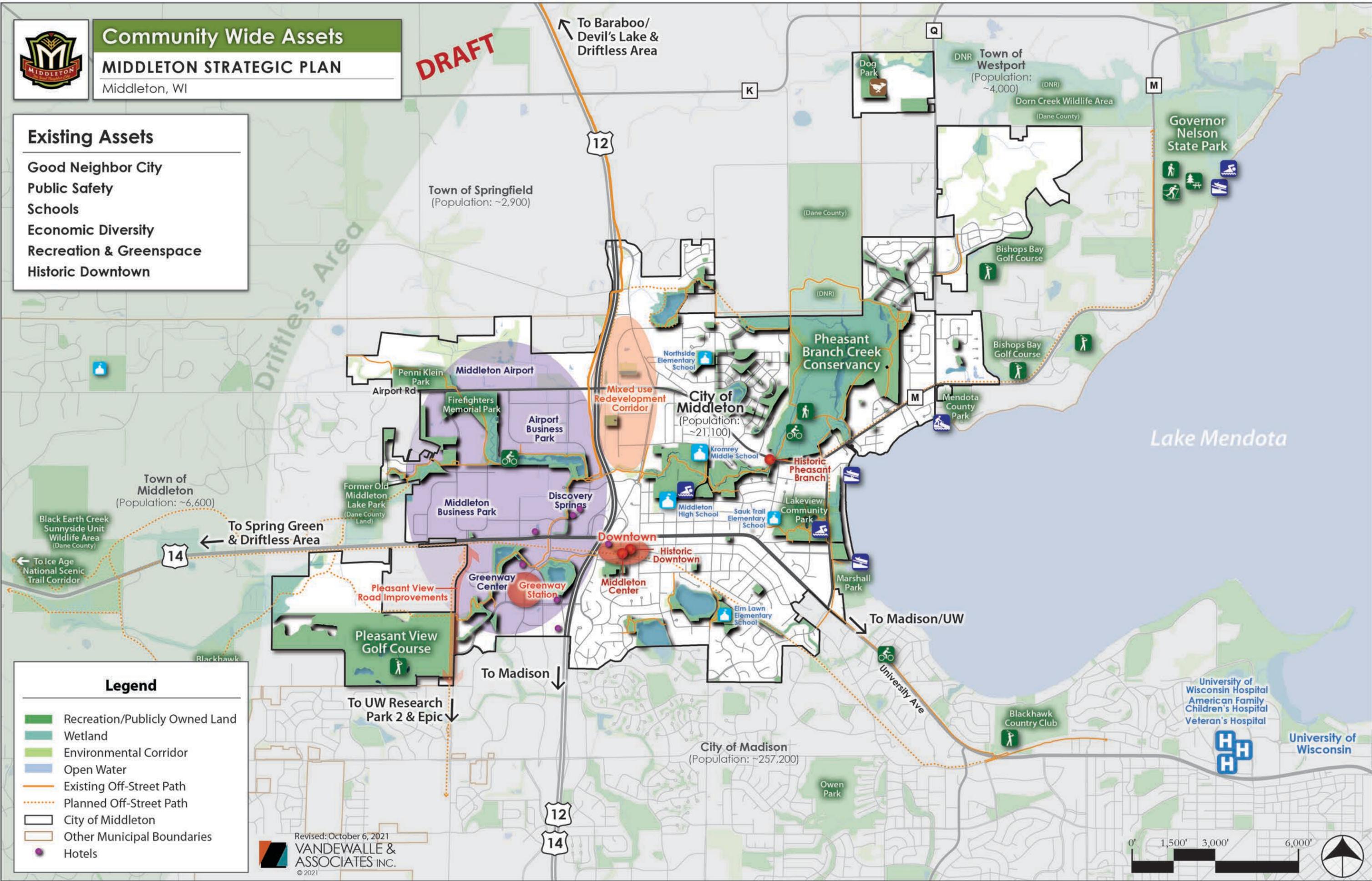
## MIDDLETON STRATEGIC PLAN

Middleton, WI

**DRAFT**

### Existing Assets

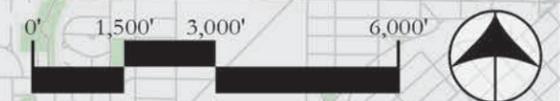
- Good Neighbor City
- Public Safety
- Schools
- Economic Diversity
- Recreation & Greenspace
- Historic Downtown



### Legend

- Recreation/Publicly Owned Land
- Wetland
- Environmental Corridor
- Open Water
- Existing Off-Street Path
- Planned Off-Street Path
- City of Middleton
- Other Municipal Boundaries
- Hotels

Revised: October 6, 2021  
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# Community Wide Opportunities

## MIDDLETON STRATEGIC PLAN

Middleton, WI

**DRAFT**

### Future Opportunities

- Excursion Rail
- Airport Safety Compliance
- Sustainability
- Stormwater Management
- Integrated Mass Transit
- Infill & Missing Middle Housing
- Grow High-Tech Companies
- Inclusion and Diversity

Infrastructure for Continued Airport Safety Compliance

Continue to Invest and Value Sustainability & Be a Leader in Stormwater Management

Residential Growth

Residential Growth

Grow High-Tech Companies

Infill Growth and Missing Middle Housing

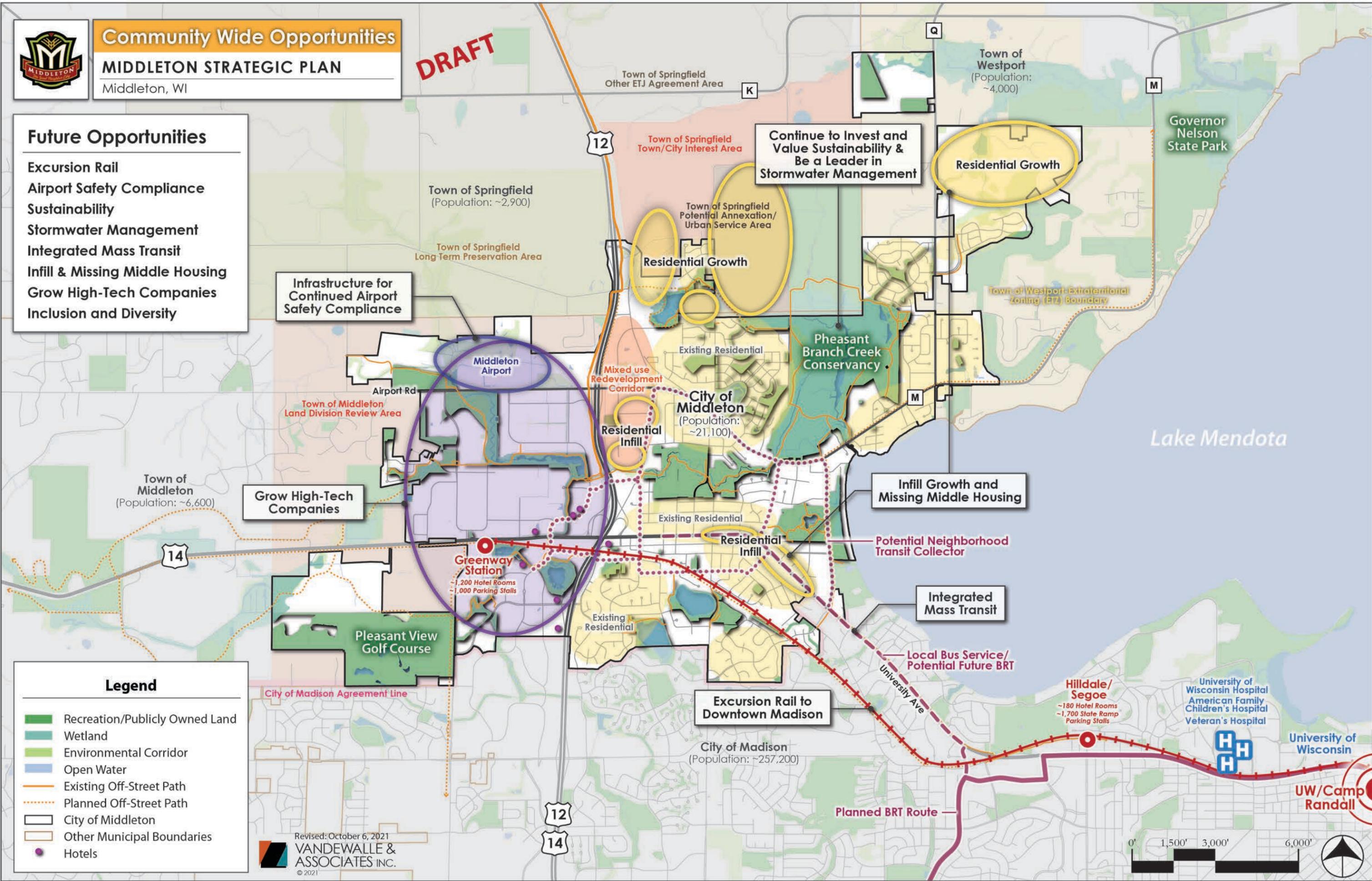
Integrated Mass Transit

Excursion Rail to Downtown Madison

### Legend

- Recreation/Publicly Owned Land
- Wetland
- Environmental Corridor
- Open Water
- Existing Off-Street Path
- Planned Off-Street Path
- City of Middleton
- Other Municipal Boundaries
- Hotels

Revised: October 6, 2021  
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Town of Springfield Other ETJ Agreement Area

Town of Westport (Population: ~4,000)

Town of Springfield (Population: ~2,900)

Town of Springfield Town/City Interest Area

Town of Springfield Potential Annexation/Urban Service Area

Town of Springfield Long-Term Preservation Area

12

M

Governor Nelson State Park

Town of Westport-Extraterritorial Zoning (ETZ) Boundary

Lake Mendota

Town of Middleton (Population: ~6,600)

14

Town of Middleton Land Division Review Area

Middleton Airport

Airport Rd

Mixed use Redevelopment Corridor

City of Middleton (Population: ~21,100)

Residential Infill

Pheasant Branch Creek Conservancy

Existing Residential

Existing Residential

Residential Infill

Potential Neighborhood Transit Collector

Pleasant View Golf Course

Greenway Station  
~1,200 Hotel Rooms  
~1,000 Parking Stalls

Local Bus Service/  
Potential Future BRT

University Ave

Hilldale/Segoe  
~180 Hotel Rooms  
~1,700 State Ramp  
Parking Stalls

University of Wisconsin Hospital  
American Family Children's Hospital  
Veteran's Hospital

University of Wisconsin

UW/Camp Randall

City of Madison (Population: ~257,200)

12

14

Planned BRT Route



## ADMINISTRATIVE SERVICES DEPARTMENT

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CITY OF MIDDLETON  
7426 HUBBARD AVENUE  
MIDDLETON, WI 53562-3118

PH 608.821.8350 FAX 608.827.1057  
DIRECTOR PH. 608 821-8356

**To:** Mayor and Members of the Common Council  
**From:** Mike Davis, City Administrator; Bill Burns, Assistant City Administrator/Finance Director;  
Brian Wolhaupter, Human Resources Manager  
**CC:** Department Heads  
**Re:** Referendum to Exceed Property Tax Levy Limit  
**Date:** March 31, 2022

### Background

Due to strict state-imposed property tax levy limits the City has limited ability to increase staffing to meet the growing service demands of the community. Under state law, the levy limit may be exceeded if the governing body approves a resolution to that effect and the increased levy is approved by voters at a referendum. On January 18<sup>th</sup>, the City Council directed staff to prepare recommendations for a referendum to be held in November 2022 to exceed the levy limit by not more than \$500,000.

### Referendum Process and Wording

To include a referendum for the November 8, 2022, general election, the City Council must approve a resolution specifying the referendum wording no later than August 30, 2022. Since the referendum wording must include the amount of the City's levy limit for the current year, the earliest a resolution can be approved is August 1, 2022, when the Department of Revenue releases the 2022 Net New Construction figures.

The wording of a referendum must specify:

- The proposed amount on an increase in the levy beyond the amount that is allowed.
- The purpose for which the increase will be used.
- Whether the proposed increase is for the next fiscal year only or if it will apply for a certain number of years or on an ongoing basis.

### Staffing Priorities

The update of the City's five-year staffing plan included requests for 16.5 general fund supported Full-Time Equivalent (FTE) positions in 2023 at a total estimated cost of approximately \$1.5 million. A referendum to exceed the levy-limit by \$500,000 only would allow the city to address about one-third of the requested positions. Some of the most important needs are in the following areas:

**Police Department** – The Police Department requested 6 police officers, 2 dispatchers, and an additional sergeant in their staffing plan which was based on the 2018 staffing study. While this level of staffing cannot be fully addressed with this referendum, adding additional police officers and dispatching staffing is important to allow the department to maintain its community policing approach and to respond to growth of the city.

**Community Services** – Middleton does not have a dedicated facility maintenance position. These duties are shared between the Director of Building Inspection and Community Services Manager. A part-time community services position could help with addressing some of the time-consuming property maintenance and complaint issues. That would allow the Community Services Manager to focus more time on facilities.

**Communications/Administration** – A dedicated communications position is one of the anticipated recommendations from the City’s strategic plan. This position could serve as a liaison between City departments and the public to help keep the community informed about City programs, services, and plans. This position could also provide support services and project assistance for the City Administrator freeing that position to focus more steadily on big picture and management issues.

**Human Resources** – A city of Middleton’s size warrants more than one human resources position. A part-time HR generalist could help to support the HR Manager particularly with recruitment. This position would also provide an important back-up for this critical function.

**Parks Crew** – It has been at least 24 years since there was an addition to full-time staffing on the Parks/Public Lands crew. As the City continues to grow, there are increased demands to maintain park and conservancy areas.

**Storm Water** – The City does not have any dedicated storm water maintenance positions. In many communities, storm water maintenance staff are funded by the storm water utility. For example, the cities of Sun Prairie and Fitchburg fund 5.0 and 2.9 FTE respectively with their utilities. In 2019 Middleton approved a referendum to increase the annual storm water utility charge per ERU from \$15 to \$45. That temporary increase will end after the 1<sup>st</sup> quarter of 2024. The City may want to consider a second storm water referendum to keep a portion of that increase in place to fund storm water utility maintenance staff. Doing so would also help to free up the time of Engineering Technicians (we have 3) for work on non-stormwater engineering. If there is no interest in funding staff through the storm water utility, the city should consider increasing the amount of the 2022 levy limit referendum to include storm water maintenance crew positions.

**EMS** – Due the growth of the community and increased call volume, the City will likely need to consider adding a third staffed ambulance sometime in the next five years. Seven full-time positions would be required along with identifying an additional station location. Those costs are beyond the scope of the 2022 referendum. However, the City should be planning for a potential additional referendum in the future.

#### Recommendation

Staff have prepared three referendum staffing scenarios for consideration by the Council. These identify general levels of staffing that could be supported within the referendum amount. Additional details would be developed regarding specific position costs and recommendations as part of the budget process.

Based on the Council’s direction to limit a referendum to \$500,000, staff recommends **Scenario 1** which would address staffing in the areas of public safety, communications, human resources, and the parks crew. While this would not fully address needs in all these areas, it would fund some critical positions that would not likely be able to be funded through other means. If this option is chosen, the City should consider funding storm water maintenance crew positions through the storm water utility in the future.

**Scenario 2** also includes a referendum to exceed the levy limit by \$500,000 but limits the staffing to public safety. This would allow for the addition of more position for the police department as well as a part-time community services position. This option is not preferred since it does not address any of the needs outside of public safety.

If the Council is not supportive of considering funding of storm water maintenance crew positions through the storm water utility, staff recommends increasing the amount of the referendum to \$700,000 and including public works/storm water positions. Maintenance of storm water facilities and conveyances is important for water quality and flood mitigation. Without a new funding source, it is not possible to adequately address these tasks while continuing to provide services for other public works functions.

## Scenario Summary

	<b>Scenario 1 \$500,000 Multiple Area</b>	<b>Scenario 2 \$500,000 Public Safety</b>	<b>Scenario 3 \$700,000 Multiple Areas</b>
Public Safety	Police Officers (2.0 FTE) Dispatcher (1.25 FTE) Comm. Svcs. (0.5 FTE)	Police Officers (4.0 FTE) Dispatchers (1.5 FTE) Comm. Svcs. (0.5 FTE)	Police Officers (2.0 FTE) Dispatchers (1.5 FTE) Comm. Svcs. (0.5 FTE)
General Government	Communications Spec./ Mgmt. Analyst (1.0 FTE) HR Generalist (0.5 FTE)		Communications Spec./ Mgmt. Analyst (1.0 FTE) HR Generalist (0.5 FTE)
Leisure	Parks Crew (1.0 FTE)		Parks Crew (1.0 FTE)
Public Works / Stormwater			SW Crew (2.0 FTE) Admin Asst. (0.25 FTE) Eng. Intern (0.25 FTE)
<b>TOTAL FTE</b>	<b>6.25</b>	<b>6.0</b>	<b>9.0</b>

### Potential Referendum Amounts and Levy Impacts

The following table provides examples of the potential impacts of an additional property tax levy of \$500,000 or \$700,000. These estimates assume a 2% increase in the City's allowable levy limit for net new construction as of January 1, 2022. Since the City's 2022 equalized and assessed values are not yet available, these estimates are based on information from the 2021 tax year. These amounts will change for the 2022 tax year. The City is also conducting an assessment revaluation of all property in 2022 which will impact the projected tax rates.

### **For Example Only: Potential Impact of Additional Levy Amounts Based on 2021 Tax Year Values**

<b>Additional Levy Amount</b>	<b>Percent Increase in Levy</b>	<b>Estimated Total Levy</b>	<b>Example Mill Rate Impact</b>	<b>Example Mill Rate Change</b>	<b>Additional Tax per \$100,000 of Value</b>
\$500,000	2.75%	\$20,244,554	\$0.17 per \$1,000	2.75%	\$16.75
\$700,000	4.12%	\$20,444,554	\$0.24 per \$1,000	3.85%	\$23.45

# Middleton Strategic Plan

## Appendix B.



## Department Head Equity Survey Key Findings

*EQT By Design developed an equity survey, as well as facilitated a focus group with Middleton department heads, centered around their knowledge, skills, and experience with equity, anti-racism, and inclusion. The survey was distributed in June 2021 and the focus group was held on June 23, 2021.*

### Department Head Survey

- Majority of the respondents are **comfortable with talking about race** or are working on being comfortable
- 90% of department head respondents **feel comfortable** when **others** talk about diversity, equity, anti-racism, and inclusion while 10% are **working on being comfortable**
- 40% of respondents **know how** to examine the causes of adverse impact(s) of policy on groups of people but are **unsure** what to do when they uncover the causes

### Department Head Focus Group

- When asked how they would describe their department's relationship with City of Middleton community members who hold identities that are different from their own, participants mentioned using the **language line** or a **language app** to communicate with community members that speak a language other than English.
  - The majority of participants would like support in creating and distributing **City resources in various languages**.
- Department Head participants are looking for a **diverse applicant pool** to fill in various roles at the City as well as **creating education pipelines** that allows diverse individuals to fill in licensed professional roles.



## City Council Equity Survey Key Findings

*EQT By Design developed an equity survey centered around the knowledge, skills, and experience with equity, anti-racism, and inclusion as a Middleton Council member. This survey was distributed in June 2021.*

### Council Member Survey

- Majority of the council respondents are **working on being comfortable** talking about race followed by 40% of them **comfortable talking** about race
- 100% of Council respondents **feel comfortable when others** talk about diversity, equity, anti-racism, and inclusion
- Council respondents are **evenly split ( 40%)** with **not knowing** how to examine the causes of adverse impact(s) of policy on groups of people with **having limited understanding** of how to examine the causes
- Council respondents are **evenly split ( 40%)** with **not knowing** how to assess the viability, sustainability, and success of equitable impact(s) of policy on groups of people with **having limited understanding** of how to assess the viability, sustainability, and success
- Majority of respondents **have limited training** with diversity, equity, anti-racism, and inclusion while **20%** have experience and understand, and feel confident sharing their knowledge.
- 80% of council respondents **understand the concept of white privilege but unsure how to talk about it.**



## Underrepresented Vision Panel Key Findings

*EQT By Design facilitated the Underrepresented Vision panel with diverse community members to gather their input on the City of Middleton's Assets, Governance, Future Growth and Hopes for the Future on September 15, 2021.*

### Community Identity + Assets

- Participants identified safety, Middleton's "small town feel," open spaces, and friendly neighbors as **key community assets**.
- There is an opportunity for the City to **improve commuter access** for residents outside the city center. Participants mentioned outlying areas don't have access to grocery stores and other day-to-day necessities.
- The majority of participants mentioned they often **don't know what resources are available** in Middleton, and if they do want to learn more about available resources, it requires extensive research from residents (i.e. no one-stop-shop available to the general public).

### City Governance

- Participants emphasized the need for the City to create a **permanent staff position, as well as develop a City-wide strategy**, to address issues around equity, anti-racism, and inclusion.
- In regards to what the City did **very well** this year, participants highlighted the City's commitment to proceed with committee meetings despite COVID. In addition, they noted that schools did a great job supporting families and children with much needed resources (i.e. school supplies and donations).
- Participants would like to see **increased funding to support City transportation** needs, in addition to an **increased City presence** in BIPOC communities.



## Accommodating Future Growth

- Participants want to ensure any initiatives centering future growth **do not overshadow key community assets** (e.g. safety, Middleton’s “small town feel,” open spaces, friendly neighbors, bike paths, current street configurations).
- There are opportunities to **develop residential housing with multiple stories** to better accommodate the City’s challenges with outward expansion, as well as provide more housing options for residents.
  - In doing this, participants emphasized the need to **ensure housing options have ample outdoor and indoor space** (versus paying high amounts to “live in a small box”), as well as remain affordable.

## Sense of Community + Future Hopes

- Participants were **optimistic about the City’s commitment to anti-racism work** and creating a more equity-centered environment for all City residents.
- Participants are concerned about having to move out of Middleton due to **increased housing costs** in search of more affordable housing options in surrounding areas.
- Participants again reiterated that they wanted to **maintain** Middleton’s “small town” and “friendly neighborhood” feel!

# Middleton Equity Survey

Department Head + Council Member Results

September 2021



# Demographics (majority)

## Age

- **Council:** 40% 35-44
- **Dept Head:** 40% 45-64

## Tenure with the City of Middleton

- **Council:** 60% have served more than 2 terms
- **Dept Head:** 60% 7+ years

## Gender

- **Council:** 80% Male  
20% Female
- **Dept Head:** 70% Male  
30% Female

## Race/Ethnicity

- **Council + Dept Head:** White / Euro-American centric

## Identify as LGBTQ+

- **Council:** 100% No
- **Dept Head:** 90% No

## Responses

- **Council :** 6
- **Dept Head:** 10

# Key Findings - Dept Head

## Talking about Race / Diversity, Equity, Anti-Racism, and Inclusion

- Majority of the respondents are **comfortable with talking about race** or are working on being comfortable
- Respondents **worry occasionally** about saying the wrong thing when talking about diversity, equity, anti-racism and inclusion. However, **90% are comfortable when others talk about** diversity, equity, anti-racism, and inclusion
- 90% of department head respondents **feel comfortable** when **others** talk about diversity, equity, anti-racism, and inclusion while 10% are **working on being comfortable**

# Key Findings – Dept Head (cont'd)

## Training / DEI Terms

- 40% of respondents have **limited training** with any prior training, education, and/or experience with diversity, equity, anti-racism, and inclusion while 30% feel they **understand** and **have experience** with it
- 50% of respondents feel **somewhat knowledgeable** about different DEI work terms and 30% **understand it and feel confident** talking about it to others

# Key Findings – Dept Head (cont'd)

## Race / Racism / White Privilege

- Respondents **somewhat understand** how race is constructed but are split between feeling **unsure how** to talk about it with **understanding it** and **feeling confident** talking about it with others
- 50% of department head respondents **understand** how racism works and **feel confident** sharing it with others
- Majority of respondents **understand** the concept of white privilege and **feel confident** sharing it with others

# Key Findings – Dept Head (cont'd)

## Adverse Impact / Examine the Causes / Advancing Equitable Impacts

- 40% of department head respondents **know how** to assess the adverse impact(s) of policy but are **unsure how** to put into action
- 40% of respondents **know how** to examine the causes of adverse impact(s) of policy on groups of people but are **unsure** what to do when they uncover the causes
- Majority of respondents have a **limited understanding** of how to advance equitable impacts when there are adverse impact(s) of policy on groups of people

# Key Findings – Dept Head (cont'd)

## Assess Viability / Support to change policy / Changes w/ an equity lens

- Department head respondents are **evenly split ( 40%)** with having a **limited understanding of how** to assess the viability, sustainability, and success of equitable impact(s) of policy on groups of people with **knowing how** to assess but **unsure how** to put it into action
- 40% of respondents said **there is strong support** to make changes to policy and programs with an equity lens while 30% said **there is some support** to make changes to policy and programs with an equity lens
- 40% of respondents said **there will be some support and implementation** with efforts to make changes with an equity lens while 30% said **there will be strong support and implementation**

## Talking about Race / Diversity, Equity, Anti-Racism, and Inclusion

- Majority of the council respondents are **working on being comfortable** talking about race followed by 40% of them comfortable talking about race
- 80% of respondents **worry occasionally** about saying the wrong thing when talking about diversity, equity, anti-racism and inclusion. While **20% do not worry about saying the wrong thing when talking about** diversity, equity, anti-racism, and inclusion
- 100% of Council respondents **feel comfortable when others** talk about diversity, equity, anti-racism, and inclusion

# Key Findings - Council

## Training / DEI Terms

- Majority of respondents **have limited training** with diversity, equity, anti-racism, and inclusion while **20%** have experience and understand, and feel confident sharing their knowledge.
- Council respondents are **evenly split ( 40%)** with **feeling somewhat knowledgeable** about different DEI terms and equity and understanding the terms but **unsure how to talk about them.**

# Key Findings – Council (cont'd)

## Race / Racism / White Privilege

- Majority of council respondents **somewhat understand** how race is constructed while 40% of them understand but unsure how to talk about.
- Council respondents are **evenly split ( 40%)** with feeling they **somewhat understand** how racism works and **understanding how** racism works **but unsure how to talk about it.**
- 80% of council respondents **understand the concept of white privilege but unsure how to talk about it.**

# Key Findings – Council (cont'd)

## Adverse Impact / Examine the Causes / Advancing Equitable Impacts

- Majority of respondents have **limited understanding** of how to assess the adverse impact(s) of policy on different groups of people
- Council respondents are **evenly split ( 40%)** with **not knowing** how to examine the causes of adverse impact(s) of policy on groups of people with **having limited understanding** of how to examine the causes.
- 100% of respondents have a **limited understanding** on how to advance equitable impacts when there are adverse impacts(s) of policy on groups of people

# Key Findings – Council (cont'd)

## Assess Viability / Support to change policy / Changes w/ an equity lens

- Council respondents are **evenly split ( 40%)** with **not knowing** how to assess the viability, sustainability, and success of equitable impact(s) of policy on groups of people with **having limited understanding** of how to assess the viability, sustainability, and success.
- Majority of respondents state **there is some support** to make changes to policy and programs with an equity lens.
- 40% of respondents state **there will be some** support and implementation with efforts to make change with an equity lens.

# Key Findings – Council (cont'd)

The established 2021 Equity values statement asserts that the City of Middleton “celebrate[s] and strive[s] for fair and just opportunities and outcomes for all people.” How would you describe the City of Middleton’s progress toward operationalizing this value?

*At the city staff level I would say the progress has been impressive. I have yet to see it fully trickle across the city as a whole.*

*We are making small steps in the right direction, but there is much more that will need to be done.*

*Limited progress*

*Poor*

*At the city staff level I would say the progress has been impressive. I have yet to see it fully trickle across the city as a whole.*

**What do you think are the City of Middleton's most pressing opportunity areas for better engaging and supporting the community around issues of equity, anti-racism, and inclusion? (Council)**

*Housing*

*Action  
not just  
words*

One major opportunity would be to have a Communications / Public Relations Director.

Holding online dialogues facilitated by members of the Middleton community in which they share their own experience as a person of color interfacing with the various structures we have in place.

- *Money, time, and a clear understanding of what needs that can / should be addressed with the limited money and time available.*
- *Empathy from individuals with more knowledge*
- *Funding*
- *Training will be huge*

What (additional) support do you need to navigate your programmatic, policy, and systems change work through an equity lens?

# I would become more active in advancing equity, anti-racism, and inclusion within my department if...

*Action, implementation by the staff is needed.*

*We have support, but lack time, money, knowledge, prioritization, and we often lack the voices and feedback of those who would benefit the most from these initiatives.*

*I received training*

*I had more information, so I knew what to do*

# Is there anything else you would like us to know or that you would like to add?

*I have worked on it for years --attended meetings, discussions, equity teams, **not much to show for it.** This year, I was successful in appointing diverse citizens to various committees and hope it will help bring some changes. **Some hope here.***

*I look forward to working with you to tear down detrimental systems and to **build up better, mutually beneficial systems** in their place.*

*There is immense support for diversity, equity, and inclusion in terms of staff time dedicated and public statements that require very little change on the part of the City. However, very little real work has been done. **The real work begins with this plan.***



*Design thinking for inclusive, equitable, people-centered outcomes*

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# Middleton Strategic Plan

## Appendix C.

City of Middleton  
Existing Plans

Department	Plan	Planning Horizon	Update Schedule	Latest Version
Administration	TID 3 & TID 5 Project Plans	Up to 27 Years	As needed	2020 /2009
Finance	Capital Improvement Plan (C.I.P.)	5 Years	1 Year	2020
Finance	Debt Management Plan	20 Years	1 Year	2019
Finance	Long Range Financial Plan	5 Years	1 Year	2019
Library	Strategic Road Map	5 Years	5 Years	2020
Planning & Community Development	Comprehensive Plan	20 Years	10 Years	2020
Planning & Community Development	Bicycle & Pedestrian Plan	10 Years	10 Years	2009
Planning & Community Development	Sustainable City Plan	10 Years	10 Years	2022
Planning & Community Development	Master Plan for Public Art & Design	20 Years	10 Years	2009
Planning & Community Development	Workforce Housing Committee Workforce Housing Strategy	5 years	5 years	2015 *Affordable Homeownership Strategy 2022
Police	WILEAG Accreditation Report	3 Years	3 Years	2016
Public Lands	Conservancy Lands Plan	5 Years	5 Years	2018
Public Lands	Comprehensive Park & Open Space Plan	5 Years	5 Years	2020
Public Lands	Marketing Plan	1 Year	1 Year	2017
Public Lands	Recreation Programming Plan	5 Years	5 Years	2018
Public Lands	Strategic Plan	5 Years	5 Years	2018
Public Works	Five-Year Street Improvement Plan	5 Years	1 Year	2020
Senior Center	National Accreditation	5 Years	5 Years	2015
Tourism	Strategic Plan	3 Years	3 Years	2019
Utility	Utility Master Plan	50 Years	20 Years	2019