



Wauwatosa, WI

Financial Affairs Committee

Meeting Agenda - Final

7725 W. North Avenue
Wauwatosa, WI 53213

Tuesday, October 31, 2023

6:45 PM

Committee Room #1 and Zoom:
<https://servetosa.zoom.us/j/81144274572>,
Meeting ID: 811 4427 4572

Regular Meeting

HYBRID MEETING INFORMATION

Members of the public may observe and participate in the meeting in-person or via Zoom at the link above. To access the Zoom meeting via phone, call 1-312-626-6799 and enter the Meeting ID.

CALL TO ORDER

ROLL CALL

FINANCIAL AFFAIRS COMMITTEE ITEMS

1. Wauwatosa Village Business Improvement District 2024 Operating Plan, Budget and Proposed Assessments [23-891](#)
2. 2024 Operating Budget Review [23-259](#)
 - Information Systems
 - Administration/Attorney/Human Resources
 - Benefits
 - Finance
 - Debt
 - Amendments
3. Recommendation to Common Council relative to the proposed 2024 Operating Budget and property tax levy [23-260](#)

ADJOURNMENT

NOTICE TO PERSONS WITH A DISABILITY

Persons with a disability who need assistance to participate in this meeting should call the City Clerk's office at (414) 479-8917 or send an email to tclerk@wauwatosa.net, with as much advance notice as possible.



Wauwatosa, WI

7725 W. North Avenue
Wauwatosa, WI 53213

Staff Report

File #: 23-891

Agenda Date: 10/31/2023

Agenda #: 1.

Wauwatosa Village Business Improvement District 2024 Operating Plan, Budget and Proposed Assessments

Submitted by:

John Ruggini, Finance Director on behalf of the Business Improvement District

Department:

Finance

A. Issue

Annual approval of the Wauwatosa Business Improvement District 2024 Operating Plan, Budget and Proposed Assessments for inclusion on the 2023 Property Tax Bills for affected properties

B. Background/Options

As required by municipal ordinance, the Village of Wauwatosa Business Improvement District (BID) has submitted their 2024 Operating Plan and Budget for approval. Representatives from the Business Improvement District will be available to provide an overview and answer any questions.

Approval of the Business Plan allows the City of Wauwatosa to add the BID special assessment to the Village business' property tax bills. The Financial Affairs Committee only has the ability to approve or disapprove the Plan, as the Business Improvement District is a separate legal entity and its budget is approved by its own Board of Directors.

The BID is proposing the following assessment rates:

Total Assessment	\$ 79,425
Minimum	None
Maximum	\$4,500
Rate	\$.95 per \$1,000

C. Strategic Plan (Area of Focus)

Priority Area One: Economic Development and Financial Resilience

D. Fiscal Impact

No impact on the City of Wauwatosa's budget

E. Recommendation

Approval of the Wauwatosa Business Improvement District 2024 Operating Plan, Budget and Proposed Assessments for inclusion on the 2023 Property Tax Bills for affected properties



Wauwatosa Village Business Improvement District

2024 Operating Plan

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Wauwatosa Village Business Improvement District 2024 Operating Plan

I. PREFACE

In September 1991, the Wauwatosa Economic Development Corporation, the Wauwatosa Village Business Corporation, and the Village Task Force commissioned the creation of a strategic plan for the Wauwatosa Village business district. Mooney LeSage Consulting, businesses and property owners, city staff, elected officials and local organizations were represented in the planning process and four objectives were identified:

1. Establish strong leadership and direction
2. Develop comprehensive plan
3. Attract private investment
4. Create cooperative marketing and promotion

The formation of the Village BID was suggested as the best means to provide the leadership and funding to achieve these objectives.

In 1993, The City of Wauwatosa received a petition from commercial property owners in the Wauwatosa Village that requested the creation of a business improvement district for the purpose of increasing activity and improving the image of the Village.

On October 26, 1993 the Committee on Public and Municipal Affairs unanimously recommended the formation of the Village Area BID District and its operating plan. The Wauwatosa Common Council approved the creation of the BID by resolution on November 3, 1993. Articles of Incorporation were signed by the Mayor and representatives of the new BID on December 8, 1993 and the first year operating plan was created for 1994.

Currently the Wauwatosa Village BID is the only BID within the City of Wauwatosa.

This Plan for 2024 has been prepared by the Wauwatosa Village BID in compliance with state statute that requires, "The board shall annually consider and make changes to the operating plan...The board shall then submit the operating plan to the local legislative body for its approval."

As used herein, "BID" shall refer to the business improvement district's operating and governance mechanism, and "District" shall refer to the property located within the physical boundaries of the business improvement district, as provided herein.

Development of the District through continuation of the BID is proposed because:

The BID law provides a mechanism whereby private property owners can work together in conjunction with the City to develop the district.

1. The district is dynamic, including properties of varying types and sizes. Some form of cost sharing is necessary because it is not feasible for a small group alone to support district development efforts. The BID plan provides a fair and equitable mechanism for cost sharing which will benefit all businesses and properties within the district.
2. Use of the BID mechanism will help ensure that the entire district will be promoted and developed as expeditiously as possible.

II. DEVELOPMENT PLAN

A. Plan Objectives

The purpose of the BID is to increase activity and improve the image of the district. Staffed with a professional manager and marketing coordinator, the BID will create a link between service, industry, retail and social activities. It is expected these efforts will help increase the profile of the business district, provide a strong voice on local matters, and enhance property values in the Village area.

The mission is to optimize building and land use, encourage private investment, and increase and improve marketing efforts specifically for the district's special needs.

In addition to the regular activities that provide a clean, safe and vibrant area, the BID must provide support to the businesses during plan implementation and construction inconveniences.

B. Plan of Action

1. Work with City Administration and Elected Officials to identify plan elements that need to be incorporated into capital improvements projects and advocate for inclusion in City capital budgets.
2. Create and begin implementation of plan to minimize the negative impact of the major street reconstruction and utility work on the BID businesses by:

Working with the City Engineering Department to develop phasing options;
Creating a project management team including BID representatives and City staff that meets for updates, planning, and feedback prior to and throughout the any project;
Building customer loyalty to the District through public relations efforts;
Serving as the business liaison and advocate to City and construction officials;
Meeting with business and property owners on a regular basis to assess impact, provide information and seek feedback or input. Providing feedback to City Project Engineer;
Creating and distributing regular and timely communication with information about street construction to BID members (property and business owners) and the residents living in surrounding neighborhoods.

3. Continued Village marketing plan and marketing materials which continues to build the positive attitude about the district by:

Hiring a professional management company and marketing/public relations person to assist the BID in the following:
Producing publicity and media coverage of district activities;
Maintaining the website: www.wauwatosavillage.org
Developing detailed plan and budget for each activity;
Continuing to build "brand" awareness for the Village through advertising, identification markers, etc.;
Creating consistent messaging in marketing strategies, public relations, and programming.

Promoting the Village to residents of Wauwatosa, with an emphasis on the neighborhoods surrounding the district.

4. Initiate and maintain district capital improvements in consultation and collaboration with the City of Wauwatosa which include:

Implementation of proposed wayfinding program within and surrounding the Village;
Seasonal flower and plantings program;
Holiday lighting and decoration program

5. Continue efforts to keep the district clean and safe, in collaboration with the City of Wauwatosa Police, Engineering and Public Works Department, which include:

Sidewalk and curb cleaning program along primary Village streets;
Weed control,
Graffiti removal,
Examination of traffic patterns to improve safety and accessibility,
Examination of parking needs and usage,
Review of pedestrian safety conditions; seek improvements, and
Safety awareness communications and commercial block watch program.

6. Work in conjunction with the City of Wauwatosa Economic Development and Community Development Departments, or other appropriate departments, identifying new business prospects, developers and economic tools for further private investment.

7. Comply with BID reporting, audit and notice requirements.

8. Identify and act upon other opportunities to carry out the purposes of the BID plan and mission.

C. Benefits

The funds collected by the BID through special property assessments will be used to benefit the Village District in the following manner:

Assist property owners to attract and retain tenants by providing an attractive environment in which customers and clients are drawn for a pleasant working, shopping, dining, living and recreating experience.

Play an active role in marketing the Village to existing and potential tenants and customers, along with organizing community events to increase traffic to the area.

Provide a culture of open communication and inclusiveness for all BID members.

Maintain inventory listing of currently available office and retail space availability and prospective sharing, information with owners and prospects.

Increase the value of Village property by encouraging building improvements and linking property owners to the City of Wauwatosa Economic Development Department or other financing options for design enhancements. A vibrant Village will also attract interested buyers further driving up demand and property values.

On-going efforts which establish strong, collaborative working relationships with the City of Wauwatosa and advocate for businesses.

D. 2024 BUDGET

Income

BID Assessments (see attached property list)	\$79,425
City Contribution	\$6,400
Event Income	\$296,515
ARPA Funds Income	\$30,000
Interest Income	\$25
Total Income	\$412,365

Administrative Expenses

BID Management	\$85,000
Office rent and office related	\$5,700
Insurance	\$2,500
Printing/Postage	\$1,500
Accounting Fees	\$2,000
Equipment/Supplies	\$5,000
Meals/Entertainment/Annual Mtg.	\$2,500
Phone	\$240
Member dues	\$1,500

Total Administrative	\$105,940
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Aesthetics

Village Ambassador	\$3,000
Banners	\$4,000
Holiday decorations	\$20,000
Aesthetics	\$9,000
Total Aesthetics	\$36,000

Event Expenses	\$198,000
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Marketing Programs

Coordinator	\$25,000
Website/Email	\$3,000
Marketing Supplies	\$2,500
Advertising (non-event)	\$5,000
Social Media Ads	\$6,000
General Marketing/Comm.	\$7,500
Total Marketing	\$49,000

Total BID Budget Expenses	\$388,940
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Budgeted for Village Improvements	\$ 23,425
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2024 BID Income (Loss)	\$ 0.00
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All expenditures, except if identified, will be incurred during calendar year 2024.

Any funds remaining on any budget line item may be moved to another budget line item, as determined by the BID Board. Any unused funds remaining at the end of the year shall be transferred to the reserve fund and used in operating plans of following years.

Additional gifts, grants, or other sources of revenue, shall be expended for the purposes identified herein, and in the manner required by the source of such funds, or, if the funds have no restriction, and in the manner determined by the BID Board.

E. Powers

The BID Board shall have all the powers authorized by law, and by this Plan including, but not limited to, the following:

1. To manage the affairs of the district;
2. To contract on behalf of the BID;
3. To develop, advertise and promote the existing and potential benefits of the district;
4. To undertake on its' own account, in coordination with the City of Wauwatosa, public improvements and/or assist in development or underwriting public improvements within the district;
5. To apply for, accept, and use grants and gifts for these purposes; and
6. To elect officers and contract services for staffing, as necessary to carry out these goals.

III. DISTRICT BOUNDARIES

The district consists generally of an area bounded by Milwaukee Avenue on the north, Honey Creek Drive on the south, 6600 W. State Street on the east, and N. 87th Street and Chestnut Street on the west. The district consists mainly of a small business retail area, professional offices, and manufacturing business. This includes 76 taxable parcels, based on the City of Wauwatosa Assessor's Records as of September 1st, 2023. Also within the district boundaries are churches, residences, and nonprofit entities which are not included in the BID assessment.

IV. ORGANIZATION

A. Operating Board

The Mayor of Wauwatosa appoints members to the BID Board. State law requires that the board be composed of at least 5 members that own or lease commercial property in the district and the majority of the board members are property owners or tenants of property owners within the district.

This board's primary responsibility is to identify District issues and activities for the short and long term, creating and implementing the current year's operating plan and multi-year projects budget including contracting for necessary staffing and services for implementation. The Board also contracts for preparation of an annual report and review on the district, annually reviews and modifies the operating plan and submits to the City of Wauwatosa Common Council for approval. Implementing the plan requires the Board to negotiate with providers of services and

materials to carry out the Plan; to enter into various contracts; to monitor development activity; and to ensure District compliance with the provisions of applicable statutes and regulations.

The Village BID Board is currently structured as follows:

1. Board size – 15 members, maximum
2. Composition – Based on by-laws, the board is composed of 15 members with at least twelve (12) positions must be filled with BID property owners or property tenants. Effort is made to maintain a 50/50 ratio. At least one and up to three board positions may be filled by community members at large. Any non-owner or non-occupant appointed to the Board shall be a resident of the City of Wauwatosa.
3. Officers – The board shall appoint a chair, vice-chair, treasurer, and secretary, any two shall have the power to execute documents on behalf of the full board, for purposes authorized by the Board. Officers shall be directors and shall be elected annually at the first regularly scheduled meeting after appointment by the Mayor of new directors.
4. Terms – Appointments to the board shall be for a term of three years, with 1/3 of the terms expiring each December. The board may remove a director, by two-thirds vote of the total board, for conduct unbecoming a member or prejudicial to the aims or repute of the BID.
5. Compensation – None
6. Meetings – All meetings of the board shall be governed by the Wisconsin Open Meetings law. Minutes will be recorded and submitted to the City and the board. The Board shall adopt rules of order to govern the conduct of its meetings and meet regularly at least annually. In 2024, the Board will meet a minimum of six times, and the annual meeting will be held in March.
7. Record Keeping – Files and records of the Board's affairs shall be kept following public records requirements.
8. Staffing – The board may contract for staffing services pursuant to this plan and subsequent modifications thereof. Unless requested otherwise by the board, any contracted staff or employees of contractors may attend all meetings of the board, but will not have voting authority.

The City of Wauwatosa Administrator and/or the Administrator's representative shall be ex-officio member of the BID Board of Directors.

On or before October 31 of each year, the Board shall submit to the Mayor its recommendations for appointments to the seats of expiring Board members.

B. Amendments and Annual Review

Section 66.1109(3) (b) of the BID Law requires the board to review the operating plan annually and make changes if appropriate, then submit the plan to the City for approval.

The process for approval of the amended plan will be:

Step 1. The Budget and Finance Committee of the Common Council will review the proposed Operating Plan at a public meeting and will make a recommendation to the full Common Council.

Step 2. The Common Council will act on the BID's proposed annual operating plan.

Step 3. The Mayor of Wauwatosa will appoint new members to the BID Board at least 30 days prior to the expiration of the outgoing board members' terms.

The BID will continue to review, revise (if necessary), and develop the operating plan annually, in response to changing development needs and opportunities in the district, within the purpose and objectives defined herein.

The BID Plan will continue to apply the assessment to raise funds to meet the next annual budget. However, the method of assessment shall not be materially altered, except with the consent of the City of Wauwatosa Common Council.

V. FINANCING METHOD

The proposed expenditures contained in Section II D, above, will be financed from funds collected from the BID assessment. For the 2024 budget, it is estimated that \$79,425 will be raised through assessments. City of Wauwatosa property located within the District is assessed at a flat rate of \$6,400 annually. Any other funds, which may be made available to the BID for the purposes contained herein, shall be collected and expended as identified in Section II D.

VI. METHOD OF ASSESSMENT

A. Parcels Assessed

All tax parcels within the district required to pay real estate taxes, including those taxed by the state as manufacturing, and all parcels used exclusively for manufacturing, will be assessed. Real property, used exclusively for residential purposes may not be assessed, as required by BID Law. Property exempt from paying real estate taxes or owned by government agencies will not be assessed.

B. Levy of Assessment

Special assessments under this 2024 Operating Plan are hereby levied against each tax parcel of property within the District that has a separate tax key number, in the amount shown on the assessment schedule that is attached in Appendix A. The assessment is based on the assessed value of the parcels (land and improvements) as shown in the record of the City Assessor's office in September 2023, except as otherwise identified below. The 2024 BID assessments shown on Appendix A were calculated at a rate of \$.95 for each \$1000 of assessed value with a minimum and maximum assessment level and exceptions as in Section VI C.

C. Schedule of Assessments

The final form of this 2024 Operating Plan has attached, as Appendix A, a schedule of all the tax key numbers within the BID, which are being assessed, and their assessment using the formula.

The assessment method is as follows:

For each parcel, the BID assessment will be computed by applying a charge of \$.95 per \$1000 of assessed value; subject however to a \$0 minimum and \$4,500 maximum.

Parcels identified as parking lots or vacant lots will be exempt from the \$0 minimum or \$4,500 maximum and are assessed at the same rate per \$1000 as other properties.

Changes to the method of assessment are subject to Common Council approval.

D. Assessment Collection

The BID assessment for each parcel will be submitted to the City of Wauwatosa which shall include it as a separate line item on the next real estate tax bill issued for that parcel.

The City shall collect the assessment with the taxes as a special charge and shall turn over all monies so collected to the BID Board for distribution in accordance with the BID Plan by the 15th day of the month following such collection.

All BID assessments shall be treated as special charges, and shall be shown on the tax bill as due and owing with the first installment of taxes. Any money collected by the City of Wauwatosa for BID assessments shall be held by the City in a segregated account until it is released to the BID Board as provided herein. The City shall comply with the requirements of Sec. 66.1109(4) Wisconsin Statutes with respect to such BID assessments by paying the charge assessed to any parcel owned by the State, County, or other governmental entity, on the date such BID assessment is due.

A list of the projected assessment for each parcel within the proposed BID and the projected total amount to be raised through assessments is available at the BID office and the City Clerk's office.

As parcels increase or decrease in value, their BID assessment will change accordingly.

The BID board shall prepare and make available to the public and the City an annual report describing the current status of the BID, including expenditures and revenues, at the time it submits its plan to the City for the following Plan Year. This annual independent review of the implementation of the annual operating plan is obtained by the BID Board and which shall be paid for out of the BID budget.

The presentation of this proposed plan to the City shall be deemed a standing order of the Board in 66.1109(4) Wis. Stats. To disburse the BID assessments in the manner provided herein.

This section shall be sufficient instruction to the City to disburse the BID assessment, without necessity of an additional disbursement agreement, disbursement method, or account method. Disbursements made under this plan shall be shown in the City's budget as a line item. Other

than as specified herein, the disbursement procedures shall follow standard City disbursement policy.

VII. CITY ROLE

The City of Wauwatosa is committed to helping private property owners in the Business Improvement District. The City will play a significant role in the creation of the BID and in the implementation of the BID Plan. In particular, the City will:

1. Voluntarily agree to include public property within the District and pay such assessments on the parcels owned by the City.
2. Act as staff to the District through adoption of the Plan and provide assistance as appropriate thereafter.
3. Monitor and, when appropriate, apply for outside funds which could be used in support of the District.
4. Collect assessments and deposit them in a segregated account; and disburse the monies to the BID along with identification of those BID assessments included in the disbursement.
5. Procure and review annual audits as required per Section 66.1109 of BID Law.
6. Provide the BID Board through the Assessor's Office on or before Sept 1 of each Plan Year, with the official City records on the assessed value of each tax key number within the district, as of that date in each plan year, for purposes of calculating the BID assessments.
7. Adopt this plan in the manner required by BID Law.
8. Encourage the County, State, and Federal Governments to support the activities of the BID.

VIII. REQUIRED STATEMENTS

The Business Improvement District Law requires the plan to include several specific statements:

66.1109 (1)(f) 1m: The district will contain property used exclusively for manufacturing purpose, as well as properties used in part of manufacturing. These properties will be assessed according to the formula contained herein because it is assumed that they will benefit from development in the district.

66.1109 (5)(a): Property used exclusively for residential purposes may not be assessed, and such properties will be identified as BID Exempt Properties on Appendix A, as revised each year.

IX. TERMINATION OF THE DISTRICT

The District may be terminated as provided by law Section 66.1109 (4m). To begin the termination process, a petition must be signed by owners of property with a total assessed value of more than 50% of the assessed valuation of all property assessed under the operating plan. The petition is then filed with the City of Wauwatosa requesting termination of the business improvement district.

X. SEVERABILITY AND EXPANSION

This Business Improvement District has been created under authority of Section 66.1109 of the statutes of the State of Wisconsin.

Should any court find any portion of the BID Law or this Plan invalid or unconstitutional, said decision will not invalidate or terminate the Business Improvement District and this Business Improvement District Plan should be amended to conform to the law without the need to re establish.

Should the legislature amend the statute to narrow or broaden the purposes of a Business Improvement District so as to, among other things, exclude or include as assessable properties of a certain class or classes of properties, then this BID Plan may be amended by the Common Council of the City of Wauwatosa as and when it conducts its annual budget approval without necessity to undertake any other act.

All of the above is specifically authorized under Section 66.1109 (3) (b) of the BID Law.

If it is determined by a court or administrative body, that a parcel of property not subject to general real estate taxes may not be included within the district, then such parcels shall be excluded from the definition of the district.

APPENDIX

Appendix A. – Schedule of tax parcels and their assessments

Attached as Separate Document

BID Assessed Values

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
291297060		COLOUR PALATE	7488 W STATE ST	\$0.00	\$0.00	\$0.00	\$0
3700205000	COM	EATS ENTERPRISES INC	7118 W STATE ST	\$328,000.00	\$69,800.00	\$397,800.00	\$378
3700207001	COM	WAUWATOSA SAVINGS BANK	7136 W STATE ST	\$459,200.00	\$76,000.00	\$535,200.00	\$508
3700218003	COM	STATE STREET LTD PARTNERSHIP	6950 W STATE ST	\$2,737,000.00	\$6,388,400.00	\$9,125,400.00	\$4,500
3700218004	COM	STATE STREET RETAIL LLC	6900 W STATE ST	\$828,000.00	\$1,202,600.00	\$2,030,600.00	\$1,929
3700218005	COM	STATE STREET LTD PARTNERSHIP	W STATE ST	\$1,031,000.00	\$64,400.00	\$1,095,400.00	\$1,041
3700218006	COM	HIRSCHMANN DOUGLAS P	6830 W STATE ST	\$171,800.00	\$148,900.00	\$320,700.00	\$305
3700218007	COM	METRO WAUWATOSA VENTURE BOULDER VENTURE LLC	6810 W STATE ST	\$1,907,200.00	\$787,100.00	\$2,694,300.00	\$2,560
3700227000	COM	ADVANCED HOME RENOVATION LLC	7028 W STATE ST	\$58,300.00	\$118,000.00	\$176,300.00	\$167
3700228000	RES	LOPERA ANTONIO J LOPERA MARIA B	7024 W STATE ST	\$45,000.00	\$126,600.00	\$171,600.00	\$0
3700229000	RES	LEWIS MARY	7018 W STATE ST	\$39,300.00	\$138,000.00	\$177,300.00	\$0
3700235002	COM	OUTPOST NATURAL FOODS COOPERATIVE	7000 W STATE ST	\$1,830,800.00	\$1,379,100.00	\$3,209,900.00	\$3,049
3700239000	RES	PAFFRATH MICHAEL F KAHN KAYLA M	1335 N 71ST ST	\$95,500.00	\$204,600.00	\$300,100.00	\$0
3700248000	RES	RAYGOZA MARCO E	1265 N 71ST ST	\$52,200.00	\$113,300.00	\$165,500.00	\$0
3700249000	RES	KNAPP RYAN ZIEGLER MEGAN E	1259 N 71ST ST	\$20,800.00	\$125,700.00	\$146,500.00	\$0
3700297000	COM	HSI-STATE STREET LLC	1359 N 74TH ST	\$89,000.00	\$0.00	\$89,000.00	\$85
3700298000	EXEMPT	WAUWATOSA WATER WORKS PUMPING STATION WELL #6	7300 BLANCHARD ST	\$0.00	\$0.00	\$0.00	\$0
3700323000	EXEMPT	CITY OF WAUWATOSA	BLANCHARD ST	\$0.00	\$0.00	\$0.00	\$0
3700335001	COM	SHEELEY JOHN F & KATHLEEN S	7433 BLANCHARD ST	\$175,000.00	\$12,500.00	\$187,500.00	\$178
3700335002	COM	SHEELEY JOHN F & KATHY S	1345 N 74TH ST	\$61,000.00	\$59,000.00	\$120,000.00	\$114
3700336000	COM	JN & M LLC	7471 HARWOOD AVE	\$264,900.00	\$18,200.00	\$283,100.00	\$269
3700337001	EXEMPT	CITY OF WAUWATOSA	PARK ST	\$0.00	\$0.00	\$0.00	\$0
3700338000	COM	MARKERRY DEVELOPMENT LLC	7511 HARWOOD AVE	\$288,000.00	\$699,700.00	\$987,700.00	\$938
3700339000	COM	MANY BLESSINGS LLC	7515 HARWOOD AVE	\$198,900.00	\$22,300.00	\$221,200.00	\$210

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
3700340000	COM	WAUWATOSA REDEVELOPMENT CORP	7601 HARWOOD AVE	\$134,100.00	\$135,300.00	\$269,400.00	\$256
3700341000	COM	WAUWATOSA REDEVELOPMENT CORP	7605 HARWOOD AVE	\$97,700.00	\$74,000.00	\$171,700.00	\$163
3700342000	COM	WAREHAM PROPERTIES ID LLC	7609 HARWOOD AVE	\$113,400.00	\$210,600.00	\$324,000.00	\$308
3700343000	COM	WAUWATOSA REDEVELOPMENT CORP	7608 W STATE ST	\$102,600.00	\$584,700.00	\$687,300.00	\$653
3700344000	COM	WAUWATOSA REDEVELOPMENT CORP	7602 W STATE ST	\$59,500.00	\$10,100.00	\$69,600.00	\$66
3700345000	COM	DROVER RUSSEL J	W STATE ST	\$44,000.00	\$7,000.00	\$51,000.00	\$48
3700346000	COM	DROVER RUSSEL J	7532 W STATE ST	\$52,200.00	\$109,100.00	\$161,300.00	\$153
3700347000	COM	DROVER RUSSELL J	7528 W STATE ST	\$54,500.00	\$88,300.00	\$142,800.00	\$136
3700350001	COM	WAUWATOSA SAVINGS & LOAN	7500 W STATE ST	\$769,100.00	\$1,408,900.00	\$2,178,000.00	\$2,069
3700353000	COM	SUSTAINABLE PROPERTIES INC	7503 HARWOOD AVE	\$250,200.00	\$579,100.00	\$829,300.00	\$788
3700354000	COM	SUSTAINABLE PROPERTIES INC	W PARK ST	\$21,500.00	\$0.00	\$21,500.00	\$20
3700355001	EXEMPT	CITY OF WAUWATOSA	W STATE ST	\$0.00	\$0.00	\$0.00	\$0
3700356000	COM	HARWOOD PLACE PARTNERS	7425 HARWOOD AVE	\$649,000.00	\$236,900.00	\$885,900.00	\$842
3700357001	COM	THE OVERLOOK LLC METROPOLITAN DEVELOPMENT	7439 HARWOOD AVE	\$1,000,000.00	\$4,223,000.00	\$5,223,000.00	\$0
3700359000	COM	SMS INVESTMENT GROUP LLC	7463 HARWOOD AVE	\$401,500.00	\$1,400.00	\$402,900.00	\$383
3700360000	COM	WAUWATAESIE MERCANTILE LLC	7479 HARWOOD AVE	\$239,400.00	\$344,300.00	\$583,700.00	\$555
3700361000	COM	SUZANNE E SWAN LIVING TRUST	7487 HARWOOD AVE	\$341,400.00	\$56,700.00	\$398,100.00	\$378
3700362000	EXEMPT	CITY OF WAUWATOSA	WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3700366000	RES	SCHOENHERR BARBARA E	1324 N 74TH ST	\$51,500.00	\$78,100.00	\$129,600.00	\$0
3700381002	COM	LEFF'S II LLC	1325 N 72ND ST	\$574,300.00	\$723,700.00	\$1,298,000.00	\$1,233
3700385000	RES	ADVANCED HOME RENOVATION LLC	7236 W STATE ST	\$72,000.00	\$180,200.00	\$252,200.00	\$0
3700386001	COM	VILLAGE VIEW APT LLC	7300 W STATE ST	\$468,000.00	\$2,507,100.00	\$2,975,100.00	\$0
3700391000	COM	SIMMERT GREGORY M	7332 W STATE ST	\$435,600.00	\$256,700.00	\$692,300.00	\$658
3700392000	COM	A-LIST INC	7342 W STATE ST	\$435,600.00	\$43,900.00	\$479,500.00	\$456
3700393001	COM	ZITZER LIVING TRUST	7346 W STATE ST	\$220,800.00	\$86,600.00	\$307,400.00	\$292
3700394000	RES	THE TERRY L FEEZOR 2020 REVOCABLE TRUST DATED JULY 14 2020	7350 W STATE ST	\$15,600.00	\$115,900.00	\$131,500.00	\$0
3700418000	COM	HARWOOD PLACE PARTNERS LLP	7405 HARWOOD AVE	\$325,100.00	\$26,400.00	\$351,500.00	\$334

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
3700419000	COM	HARWOOD PLACE PARTNERS A WI GENERAL PARTNERSHIP	HARWOOD AVE	\$316,400.00	\$23,400.00	\$339,800.00	\$323
3700427000	COM	HARWOOD PLACE PARTNERS A WI GENERAL PARTNERSHIP	7400 HARWOOD AVE	\$601,600.00	\$145,000.00	\$746,600.00	\$709
3700436000	EXEMPT	WAUWATOSA WOMANS CLUB	1626 WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3700448000	COM	JMC PROPERTIES LOC 051 LLC	7416 HARWOOD AVE	\$1,070,400.00	\$2,487,000.00	\$3,557,400.00	\$3,380
3700454000	EXEMPT	IRISH FESTIVALS INC	1532 WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3700455000	EXEMPT	ST BERNARDS CONGREGATION	7474 HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3700501005	COM	MILW PSYCHIATRIC HOSPITAL INC	1220 DEWEY AVE	\$1,517,000.00	\$4,311,000.00	\$5,828,000.00	\$4,500
3700501006	EXEMPT	MILW COUNTY XWAY	HONEY CREEK PKWY	\$0.00	\$0.00	\$0.00	\$0
3700502002	EXEMPT	CITY OF WAUWATOSA	1198 W 70TH ST	\$0.00	\$0.00	\$0.00	\$0
3700505000	RES	ALEXANDER JULIE M	7224 W STATE ST	\$37,000.00	\$124,500.00	\$161,500.00	\$0
3700506000	RES	BELLINGER MARGARITA	7224 W STATE ST	\$37,000.00	\$129,900.00	\$166,900.00	\$0
3700507000	RES	FOGARTY JOSEPH W	7224 W STATE ST	\$37,000.00	\$132,000.00	\$169,000.00	\$0
3700508000	RES	LINSSEN BRET	7224 W STATE ST	\$37,000.00	\$132,000.00	\$169,000.00	\$0
3700509000	RES	MODL PATRICK J	7224 W STATE ST	\$37,000.00	\$129,400.00	\$166,400.00	\$0
3700510000	RES	MARTIN MARCIA ANN SIMONS STANLEY	7224 W STATE ST	\$37,000.00	\$129,400.00	\$166,400.00	\$0
3700511000	RES	THIEL MICHAEL	7224 W STATE ST	\$37,000.00	\$138,200.00	\$175,200.00	\$0
3700512000	RES	DONNELLY BETH A	7224 W STATE ST	\$37,000.00	\$138,200.00	\$175,200.00	\$0
3700513000	RES	THE BUTTON HOUSE LLC	7224 W STATE ST	\$37,000.00	\$197,900.00	\$234,900.00	\$0
3700514000	RES	HEYMAN ERIC	7224 W STATE ST	\$37,000.00	\$197,900.00	\$234,900.00	\$0
3700515000	RES	KJB LLC	7224 W STATE ST	\$37,000.00	\$199,400.00	\$236,400.00	\$0
3700516000	RES	PAVLOVIC GEORGE IVAN	7224 W STATE ST	\$37,000.00	\$199,400.00	\$236,400.00	\$0
3700517000	COM	JPMORGAN CHASE BANK, NA	7430 W STATE ST	\$168,500.00	\$593,900.00	\$762,400.00	\$724
3700518000	COM	HSI-STATE STREET LLC	7440 W STATE ST	\$93,900.00	\$484,500.00	\$578,400.00	\$549
3700519000	COM	HSI-STATE STREET LLC	7450 W STATE ST	\$295,500.00	\$1,188,500.00	\$1,484,000.00	\$1,410
3700520000	COM	HSI-STATE STREET LLC	7480 W STATE ST	\$440,900.00	\$1,907,400.00	\$2,348,300.00	\$2,231
3700521000	COM	HSI-STATE STREET LLC	7400 W STATE ST	\$2,516,000.00	\$15,904,400.00	\$18,420,400.00	\$0
3709996001	EXEMPT	CITY OF WAUWATOSA	MOTOR AVE	\$0.00	\$0.00	\$0.00	\$0
3709997000	EXEMPT	CP RAIL SYSTEMS SOO LINE RAILROAD CO - RE DEPT	W STATE ST	\$0.00	\$0.00	\$0.00	\$0
3709998000	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710016002	EXEMPT	ST MATTHEWS EVANGELICAL LUTHERAN CHURCH	1615 WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
3710019002	EXEMPT	WAUWATOSA METHODIST CHURCH	1529 WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3710019002	EXEMPT	WAUWATOSA METHODIST CHURCH	1529 WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3710025005		CITY OF WAUWATOSA	1601 UNDERWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710025006	COM	HARMONEE SQUARE PARTNERS LLC	1501 UNDERWOOD AVE	\$1,289,900.00	\$6,816,100.00	\$8,106,000.00	\$4,500
3710030001	EXEMPT	ST MATTHEWS EVANGELICAL LUTHERAN CHURCH	UNDERWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710038000	COM	WAUWATOSA AVENUE LLC	1505 WAUWATOSA AVE	\$144,000.00	\$127,100.00	\$271,100.00	\$258
3710039000	EXEMPT	CITY OF WAUWATOSA	WAUWATOSA AVE	\$0.00	\$0.00	\$0.00	\$0
3710041002	COM	PLATINUM PROPERTY INVESTMENTS LLC	W HARMONEE AVE	\$30,100.00	\$2,700.00	\$32,800.00	\$31
3710042001	COM	1460 VILLAGE LLC	1508 UNDERWOOD AVE	\$566,000.00	\$814,700.00	\$1,380,700.00	\$1,312
3710043002	EXEMPT	WAUWATOSA METHODIST CHURCH	UNDERWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710054001	COM	COMMUNITY DEVELOPMENT AUTHORITY OF THE CITY OF WAUWATOSA	7746 MENOMONEE RIVER PKWY	\$0.00	\$0.00	\$0.00	\$0
3710055001	COM	DITTMAR BUILDING LLC	MENOMONEE RIVER PKWY	\$165,400.00	\$9,000.00	\$174,400.00	\$166
3710056001	COM	1417 WAUWATOSA LLC SIEGEL-GALLAGHER MGMT CO	1415 WAUWATOSA AVE	\$1,324,400.00	\$1,776,500.00	\$3,100,900.00	\$2,946
3710059000	COM	QUATRE CHIENS LLC	1409 WAUWATOSA AVE	\$257,400.00	\$277,300.00	\$534,700.00	\$508
3710060001	COM	QUATRE CHIENS LLC	7600 W HARWOOD AVE	\$335,700.00	\$973,900.00	\$1,309,600.00	\$1,244
3710062001	COM	LEFEVER POINT LLC METRO DEVELOPMENT	7700 W STATE ST	\$1,034,100.00	\$3,449,200.00	\$4,483,300.00	\$4,259
3710066000	COM	DRAPER LINDSEY D	1430 UNDERWOOD AVE	\$88,800.00	\$265,900.00	\$354,700.00	\$337
3710067000	COM	PLATINUM PROPERTY INVESTMENTS LLC	1442 UNDERWOOD AVE	\$448,800.00	\$147,500.00	\$596,300.00	\$566
3710068001	COM	DITTMAR BUILDING LLC	UNDERWOOD AVE	\$177,300.00	\$10,100.00	\$187,400.00	\$178
3710070000	COM	DITTMAR BUILDING LLC	1409 UNDERWOOD AVE	\$375,200.00	\$394,100.00	\$769,300.00	\$731
3710072000	EXEMPT	CP RAIL SYSTEMS SOO LINE RAILROAD CO - RE DEPT	W STATE ST	\$0.00	\$0.00	\$0.00	\$0
3710073000	COM	EVEREST TOSA 2 LLC	7603 W STATE ST	\$156,600.00	\$204,400.00	\$361,000.00	\$343
3710074002	COM	LINCOLN 50 LLC AS TO A 54.5% INTEREST EVEREST TOSA LLC AS TOA 45.5% INTEREST	7615 W STATE ST	\$1,001,700.00	\$1,294,300.00	\$2,296,000.00	\$2,181
3710076000	COM	7707 HARWOOD LLC PHELAN DEVELOPMENT	7677 W STATE ST	\$189,000.00	\$1,234,000.00	\$1,423,000.00	\$1,352
3710077000	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710078001	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
3710080001	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710081000	EXEMPT	MILW COUNTY XWAY	HONEY CREEK PKWY	\$0.00	\$0.00	\$0.00	\$0
3710107001	EXEMPT	MILW COUNTY XWAY	MENOMONEE RIVER PKWY	\$0.00	\$0.00	\$0.00	\$0
3710109000	EXEMPT	MILW COUNTY XWAY	MENOMONEE RIVER PKWY	\$0.00	\$0.00	\$0.00	\$0
3710110000	COM	7700 HARWOOD LLC	7700 HARWOOD AVE	\$192,200.00	\$888,000.00	\$1,080,200.00	\$1,026
3710111001	EXEMPT	CITY OF WAUWATOSA	7720 HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710111001	EXEMPT	CITY OF WAUWATOSA	7720 HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710133001	EXEMPT	CP RAIL SYSTEMS SOO LINE RAILROAD CO - RE DEPT	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710135001	COM	HARWOOD AVE LLC	7734 HARWOOD AVE	\$391,600.00	\$387,100.00	\$778,700.00	\$740
3710136001	COM	7754 HARWOOD PARTNERS LLC	7754 HARWOOD AVE	\$509,400.00	\$27,000.00	\$536,400.00	\$510
3710137000	COM	HARWOOD APPARTMENT LLC	7762 HARWOOD AVE	\$369,200.00	\$87,300.00	\$456,500.00	\$434
3710138000	COM	SCHULZ ROBERT J & DIANE L	7772 HARWOOD AVE	\$183,800.00	\$94,300.00	\$278,100.00	\$264
3710139001	RES	ROSS CATHERINE F	7810 HARWOOD AVE	\$114,500.00	\$115,200.00	\$229,700.00	\$0
3710141000	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710142000	EXEMPT	CITY OF WAUWATOSA	HARWOOD AVE	\$0.00	\$0.00	\$0.00	\$0
3710143000	COM	SHERWOOD MANOR XI LLC	7838 HARWOOD AVE	\$160,000.00	\$282,600.00	\$442,600.00	\$420
3710144000	COM	SHERWOOD MANOR XI LLC	7844 HARWOOD AVE	\$160,000.00	\$281,200.00	\$441,200.00	\$419
3710146000	COM	7900 HARWOOD LLC	7900 HARWOOD AVE	\$432,000.00	\$1,438,500.00	\$1,870,500.00	\$0
3710147000	COM	PAVELCHIK JEFFERY P	7918 HARWOOD AVE	\$400,300.00	\$200,300.00	\$600,600.00	\$571
3710148001	COM	WILSHIRE MANOR ASSOCIATES LLP	7930 HARWOOD AVE	\$1,080,000.00	\$3,173,400.00	\$4,253,400.00	\$0
3710152001	COM	FRATELLI PROPERTIES LLC	7954 HARWOOD AVE	\$764,800.00	\$1,445,500.00	\$2,210,300.00	\$2,100
3710154005	IND	HOUSE 7 LLC	1300 GLENVIEW PL	\$1,296,100.00	\$2,325,000.00	\$3,621,100.00	\$3,440
3710171000	RES	MBD PROPERTIES LLC	1286 GLENVIEW PL	\$74,900.00	\$271,600.00	\$346,500.00	\$0
3710183000	COM	SHIRLEYS HOUSE LLC	7845 HARWOOD AVE	\$163,200.00	\$108,200.00	\$271,400.00	\$258
3710202000	RES	D&K HOMES AND APARTMENTS LLC	7923 HARWOOD AVE	\$86,900.00	\$137,200.00	\$224,100.00	\$0
3710204000	RES	SULLIVAN JULIE A	7907 HARWOOD AVE	\$58,700.00	\$256,400.00	\$315,100.00	\$0
3710205000	COM	MUSSATTI DALE R & ANNE M	7935 HARWOOD AVE	\$94,000.00	\$84,000.00	\$178,000.00	\$169
3710206000	COM	JASPERILLA LLC	7945 HARWOOD AVE	\$93,900.00	\$59,900.00	\$153,800.00	\$146
3710208000	COM	CAPITAL H INVESTMENTS LLC	1244 GLENVIEW AVE	\$72,500.00	\$147,500.00	\$220,000.00	\$209
3710277000	RES	ALLEN FAKLER	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710278000	RES	FERN WILLIAM W	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710279000	RES	YAN XIAOCAI & FAN XUEJUN	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710280000	RES	TONG JIAQING	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0

parcel number	Property Class	ownername	Site address	Land Value	Building Value	Total Value	2024 Assessment
3710281000	RES	FRANKE WAYNE AND MERYL AND SARA	7850 HARWOOD AVE	\$18,000.00	\$122,500.00	\$140,500.00	\$0
3710282000	RES	KAMPSCHROER JOESPH KAMPSCHROER LORI AND KAMPSCHROER ELLEN	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710283000	RES	FLEURY AMY L	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710284000	RES	SANVANSON GEORGE B & ADELE	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710285000	RES	FLITCROFT DAVID S & SHARON E & MADELYN A	7850 HARWOOD AVE	\$18,000.00	\$116,700.00	\$134,700.00	\$0
3710286000	RES	DE GROOT MARY	7850 HARWOOD AVE	\$18,000.00	\$117,200.00	\$135,200.00	\$0
3840009001	COM	LEARS WISCONSIN LLC TOSA VILLAGE	6650 W STATE ST	\$4,711,000.00	\$3,142,200.00	\$7,853,200.00	\$4,500
3840009002	COM	MRED 68TH STATE ASSOCIATES A WISCONSIN LIMITED PARTNERSHIP	6600 W STATE ST	\$2,436,200.00	\$1,207,200.00	\$3,643,400.00	\$3,461

\$46,683,300	\$87,865,200	\$134,548,500	\$79,425
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Total Assessment	\$ 79,425
Minimum	None
Maximum	\$4,500
Rate	\$.95 per \$1,000



Wauwatosa, WI

7725 W. North Avenue
Wauwatosa, WI 53213

Staff Report

File #: 23-259

Agenda Date: 10/31/2023

Agenda #: 2.

2024 Operating Budget Review

- Information Systems
- Administration/Attorney/Human Resources
- Benefits
- Finance
- Debt
- Amendments

2024 OPERATING BUDGET REVIEW SCHEDULE

Financial Affairs Committee

Tuesday, October 31, 2024

- Information Systems – 20 minutes
- Administration/Attorney/Human Resources – 20 minutes
- Benefits- 15 minutes
- Finance – 15 minutes
- Debt – 15 minutes
- Amendments

Times are approximate and for planning purposes only



To: Judge Krista LaFave
cc: Financial Affairs
Committee

Regarding staffing of the court functions, I think we can all agree that the common goal is to provide the best customer service to our customers and residents and to provide the Court with the resources they need to continue efficient operations. The City's proposed solution is to move the court's day-to-day functions into the City Clerk's office. We believe this solution provides for the most efficiency and gains in customer service:

- Over the past several years, the City has realized much success in combining administrative functions for efficiency in operations as well as customer service. With every position that turns over in the City, we conduct an analysis on that position to determine 1) how have the duties of the position and the department changed over time, 2) what technical gains have we made and how does that impact the work, 3) what efficiencies are to be gained from adjusting the position. We have done this successfully in the City Clerk's Office, DPW, Engineering, Finance, Administration, Police and Development. We have also implemented an administrative floating pool which allows cross-coverage amongst many departments.
- Office Assistants in all of our departments require critical attention to detail and a high-level of accuracy. You will find that the City Clerk's Office does a lot of unique and detail-oriented work that requires accuracy and confidentiality, such as voter registrations and permitting.
- Moving the court clerk daily operations to the Clerk's Office location allows for the three Office Assistants in the Clerk's Office to be trained in court functions. Although it may seem initially overwhelming to train 3 individuals, the long-term benefit of having multiple individuals trained in court functions will best serve our customers and the court's operations. We will assist in creating a training plan that will include in-person rotations as well as documenting court procedures, which is best practice for operational continuity and is something that the City has implemented in many departments. The notion that .25 of a person





(assuming 3 people are trained) is primarily for budget purposes. In actuality, as customer interactions occur, the individuals in the office will learn and train organically by shadowing the Office Assistant for Municipal Court.

- The Court Clerks in partnership with other departments have made significant technology improvements in the Court function over the past 10 years that have stream-lined their jobs including online payments beginning in 2017 and integration with State databases.
- The Office Assistants in the City Clerk have the requirement for some night work in their job description so we are confident that we can work out a rotation that works.
- We will maintain the Court Clerk Office for record storage, a work station and a meeting space for the Judge. With the other Office Assistants trained in daily operations, the Office Assistant for Municipal Court can easily return to that office as needed for paperwork, analysis and filing. A reorganization of supplies in the Clerk's office is underway to allow Court access to locate locked files adjacent to a work station that are needed more often.
- This solution will allow the Office Assistant for Municipal Court more flexibility to participate in employee events, wellness offerings and take full-weeks of vacation at a time. It will also provide more of a team environment and opportunity for more daily interaction with peers.
- Perhaps the biggest opportunity is to improve customer service continuity. Often times, customers that come to the window to pay tickets are economically disadvantaged. They have taken off work and rode the bus to City Hall to pay the ticket. There have been many times when the court office has been closed and City Hall employees have had to turn customers away. Our solution provides an office that is always open during city hall hours.
- While we endeavor to fill the vacancies in the police department, given the anticipated retirement eligible staff over the next few years, it is highly improbable that we will fully close the gap of

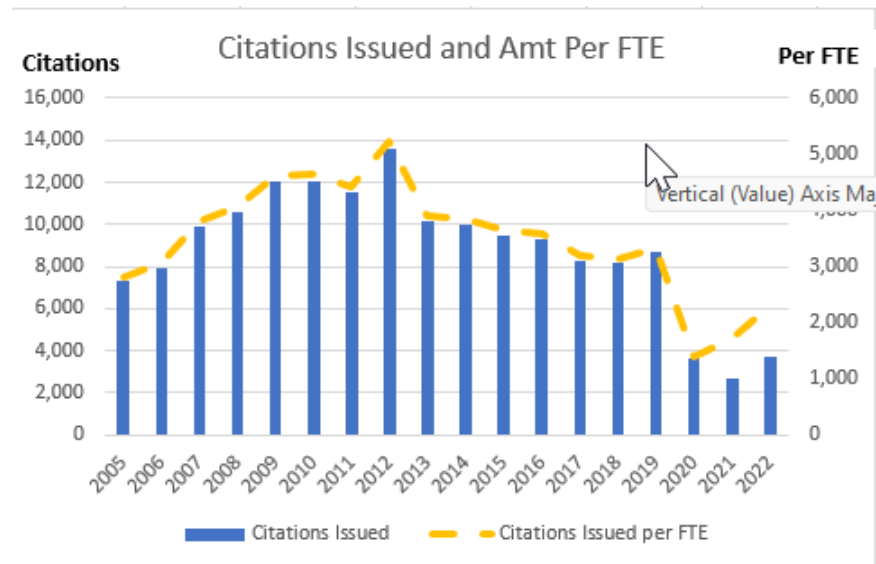




unstaffed positions. In addition, our Police Chief has discussed his policing model of issuing warnings in part and tickets to a lesser degree.

- Adding staff to the Police Department is entirely related to the Milwaukee Regional Medical Center (MRMC) contracts. On the MRMC campus, there are no public roads. This sector will yield substantially fewer traffic citations than other sectors in the city.

We completed a workload analysis based on the number of citations issued per FTE in Municipal Court and that data is below. It shows that workload per FTE has decreased since 2005 even with reductions in staffing.



Citations per FTE	
Min	1,392
Avg	3,407
Max	5,238

We have handled an average of 3,407 citations per court clerk and a maximum of 5,238. We believe we should plan for 5,000-7,000 citations which could be handled by 1.6 FTE or less, especially when considering the technology improvements that have been made.





Regarding how the events unfolded at Financial Affairs, it wasn't our intention to mislead you about the funding of the .6. We apologize that it wasn't clear, it was certainly not intentional. The Municipal Court narrative is copied below and shows how we communicated the change. We also discussed this plan with you at a meeting on October 6, as well as in phone calls with various staff members.

their ability to pay with the Judge. At this time, there are 250 open warrants. No commitments for jail time have been issued since 2019.

- In 2022, the court processed drivers license suspensions on 616 citations and 325 in the first half of 2023.

2024 SIGNIFICANT CHANGES

- The Court requests an increase from the part-time clerk position (.6 FTE) to full-time. The Court predicts an increase in citations in 2024 to levels that have not been seen since before the pandemic, when the Court was staffed with 2.6 FTEs. In order to ensure collection of fines, enforce the Judge's orders, and contemplate the additional changes that the Judge wishes to implement (see further bullets below), a full-time second clerk is needed. A second full-time clerk will permit the Court to staff the Court office for the same hours as City Hall without needing overtime. The second full-time clerk will be able to cover court nights and will ensure continuity into the future.

At a minimum, the Court needs 1.6 dedicated employees. The .6 position cannot be staffed by different employees from other Departments. In addition to the impossibility of training multiple individuals as "clerks" and the reality that it takes 1-1.5 years for a clerk to operate independently, the Court deals with sensitive information and cannot have multiple different individuals working in the court office. The additional payroll cost is \$38,074.48 to change from a .6 to a 1.0 FTE. More information on this request is provided in the

Finance Department Note:
Recognizing the Municipal Court as a co-equal branch of the City government, the narrative as submitted by the Court has not been changed. However, this request was not included in the Executive Budget due to financial constraints. Instead, existing personnel in other City Hall departments are proposed to replace the 0.6 FTE part-time position. City Administration will develop a more detailed plan with current Court staff and the Municipal Judge prior to the start of the fiscal year.

The fact is we had a \$1,000,000 budget gap and not funding the 0.6 was part of the way that we closed that gap. However, we did not reduce staffing in other departments. Instead, we reduced our floating capacity as we are assigning some time that would be spent filling in for vacant positions to support the work of the court.

We also recommend refraining from increasing the Court Revenue. We are starting to see the delayed impact of reduced citations. The monthly





collection amounts for 2021-2023 are indicated below. Based on prior years, it looks like we will end the year around \$275,000 compared to a budget of \$390,000. Back in July, we thought we would be closer to \$370,000. Particularly telling is period 3 and 4 (March and April) when tax intercept revenue comes in and that was down significantly in 2023. We think you are right, that as citation numbers go up, revenue will go up but it will likely take several years.

Row Labels	2021	2022	2023
P0			0
P1	-21,736	-18,750	-19,413
P2	-21,892	-23,221	-22,534
P3	-51,056	-57,611	-42,130
P4	-57,047	-35,908	-25,707
P5	-30,574	-35,603	-23,158
P6	-31,417	-30,304	-23,738
P7	-37,754	-25,478	-23,735
P8	-22,515	-18,616	-20,422
P9	-28,030	-20,956	940
P10	-23,538	-18,881	0
P11	-20,946	-16,770	0
P12	-13,918	-14,876	0
P13			0
Grand Total	-360,424	-316,974	-199,897

We realize this is a significant change for the Court but we request the opportunity to try this model. If it does not work to your satisfaction, it will not be difficult to change direction. On the contrary, if we hire an additional person and find that there is insufficient work, it will be more difficult to make adjustments. We look forward to our continued partnership with you as we work to best serve the City of Wauwatosa.





City of Wauwatosa Municipal Court
The Honorable Krista G. LaFave

October 30, 2023

Dear Finance Committee Members and Mr. Archambo:

The Wauwatosa Municipal Court is the third branch of our local government, overseen by the Judge and maintained at the expense of the municipality. The Judge determines “the hiring, termination, hours of employment, and work responsibilities of the court personnel.” Wis. Stat. § 755.10. I disagree with the plan proposed by the City Administrator, both for staffing and moving the court office. The interests of Wauwatosa are best met by staffing my court with 2.0 FTE or, at a minimum, 1.6 FTE who are two employees.

I note in the budget that there is not a reduction in the City Clerk budget for the .6 FTE that will be assigned to the court.¹ The current plan will disrupt the City Clerk’s office, their staff, and my court. Despite multiple meetings and phone calls, I observe that this plan saves the City approximately \$15,000 but comes at the expense of staffing the court, having well-trained court clerks, efficiently processing citations and orders, undertaking collection activities, and risks issues related to suspensions and warrants. If staffing is to be shared, I must meet these individuals, approve of them, appoint them, and have them work in the court office for the .6 hours that they are assigned to court.

Historical Information

The letter from Mr. Archambo contains historical data that both the City and I have previously agreed is not as relevant given the court’s move to the TIPSS computer program. Given advances in technology and taking credit card payments, this is a fair assessment. The City Administrator’s average for FTE over 20 years is, therefore, incorrect. Looking at the past 10 years in citation data provides a different picture:²

YEAR	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Citations	9,935	9,398	9,233	8,185	8,069	8,629	3,569	2,678	3,672	5500
Court Clerks	3	2.6	2.6	2.6	2.6	2.6	1.6	1.6	1.6	1.6
# Citations per FTE	3312	3615	3551	3148	3103	3319	2231	1674	2295	3438

Average Citations Per FTE: 3,050³

Based on this historical data, looking to 2024 where it is assumed citations will be between 5500-7000, we need 2.0 FTE court clerks.

¹ It is concerning to me whether there are actually three individuals who have an extra 8 hours each week of time to devote to court business. One of the City Clerk’s assistants is already shared with the City Assessor (p. 35 of the budget).

² In 2019, the Court proposed managing the parking tickets given the number of employees and the new TIPSS program. The City conducted a study and determined that it would save a considerable amount of money. However, the decision was made not to make that change. In 2020, the Court lost 1.0 FTE, the Court went to 1 night a week, and Court hours changed to 8:00-4:00.

Additional note: police officers staffing the Milwaukee Regional Medical Complex typically write citations for disorderly conduct or theft, not for traffic. One of our trials in 2022 was for disorderly conduct at Froedtert.

³ This removes the highest and lowest numbers to get an accurate average.

Sufficient Staffing Looking Ahead

The computer software used by the Court, TIPSS, advises that generally it takes a court clerk 1 hour of time to process 100 citations each week. If we look at a range of 5,500-7,000 citations, that means 55-70 hours per week simply to process citations. Even if the average became 125 citations per hour, that would be 44-56 hours per week only to process citations. This does not take into consideration the hours spent processing my orders after court, following up with defendants, scheduling trials, scheduling motion hearings, reviewing correspondence from defendants, undertaking collection efforts, and more. Court has been once a week, but we are facing the likelihood of court being twice a week. Even last week, court was on Monday and Wednesday. An additional 4-8 hours can safely be assumed for court.

Even with the TIPSS program, an individual must spend time on each citation. The court clerk must review each citation individually and ensure accuracy and speak with the Police Department for incorrect or invalid citations. SDC and TRIP interfaces for collections still require the court clerk to review the citation for pending court action and review the court file. Online payments require reviewing the citation, and additionally cancelling any suspensions or warrants.

A 2.0 FTE is the solution for Wauwatosa to provide the outstanding customer service that it prides itself on. The City provides citations not just to its own residents, but also non-resident individuals. These individuals need to feel confident that their citations are handled with care and concern by well-trained individuals who understand the court processes. All estimates point to 5500 citations this year and likely an increase next year. Given this, even 1.6 court clerks is not sufficient staffing. And 1.0 Court Clerk and .6 “shared” clerks is definitely not sufficient.

Moving the Court Office

As I previously stated, I am not in agreement to move the Court office. Wis. Stat. § 755.11 is clear that the court records shall be kept separate from all other records. “The judge shall store all records in the office of the court clerk or in another appropriate facility designated by the council or board. Access to the records shall be restricted to court personnel except as authorized by the judge or by law.” The Court Clerk utilizes paper records on a daily basis. Preparing for court requires preparing the court files and docket, which includes citations, police records, juvenile records, fingerprints, and more. This plan will require Robin to carry her files back to the court office every day to abide by the statutory requirements. There has been no conversation with myself or Robin regarding space needed for records or how she uses the records on a daily basis. It is unclear how the city clerk’s office is preparing for this move without speaking with the court.

Additionally, if the Court is not staffed with 2.0 FTE and remains at 1.6 FTE, any concerns regarding payment while the office is closed for illness, training, or extenuating circumstances can be met by another department having TIPSS Cash Register.⁴ There is only a small cost in the future for the annual license, and it makes sense to have an individual in finance be trained on this program.

⁴ This program gives the user very limited access to the court program. Many courts use this for finance to take payments. It was not previously purchased by the City of Wauwatosa due to a cost concern. My understanding from previous meetings is that there is sufficient funds to purchase this now.

I believe customer service is best rendered at the Court office. The defendants who appear in person are entitled to have privacy while discussing the sensitive issues that bring them to City Hall. They are also entitled to have the court clerk have their records available to review, not have to walk down the hall to obtain the records that are restricted in the court office. If the decision is made to have floaters cover the .6 position, they can spend their hours working in the court office on court items.

Conclusion

I request that the Financial Affairs Committee make an amendment to the budget to provide an additional \$37,883 to change the .6 FTE to a 1.0 FTE. Alternatively, it is my request that the Committee make an amendment to provide an additional \$14,694 to the Court to reinstate the .6 FTE as one person.

Thank you for your time and consideration.

Respectfully yours,

A handwritten signature in black ink, appearing to read "Krista G. LaFave", written in a cursive style.

Krista G. LaFave

Municipal Court Staffing Amendment Options

Options	Additional Hours not currently budgeted	Effective FTE ¹	Number of Positions	Additional Cost to the 2024 Budget			
				Wages Cost	FICA and WRS	Health Insurance	Total
Current 2024 Budget	0	0.60	Multiple Existing	Included in Budget	Included in Budget	Included in Budget	Included in Budget
Option 1: Restore 0.6 FTE dedicated to the Court	520	0.60	1 new	\$ 12,828	\$ 1,866	NA	\$ 14,694
Option 2: Increase staffing to 1.0 dedicated to court	867	1.00	1 new	\$ 21,380	\$ 3,111	\$ 13,392.20	\$ 37,883

Assumptions		
Hourly Rate (Control Point, Range NR E, adjusted for 2024 COLA)	\$ 24.67	
FICA Rate (Social Security and Medicare)	7.65%	
2024 WRS Rate	6.90%	
2024 Health Insurance and Worker Comp Rate	26.10%	

¹ The 2024 Budget assumed that a portion of existing floating capacity would be used to staff the Municipal Court. As a result, restoring a 0.6 FTE (Option 1) does not equate to adding 1248 hours. Instead, we've costed the impact of restoring 0.25 of floating capacity. Similarly, adding 1.0 FTE does not equate to 2080 hours. Instead it is proportional to Option 1 but also includes health insurance costs. While not exactly straight forward, given how the 2024 Budget is structured, the Finance Department, felt this was the fairest approach to costing this amendment.