

5-Year Strategic Plan



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EXECUTIVE SUMMARY

Beginning in November 2021, the City of Port Washington engaged Northspan to conduct a strategic planning process. The process began with the following planned deliverables:

- Vision Statement
- Mission Statement
- Statement of Values
- Environmental Scan
- SWOT Analysis
- Legislative and Organizational Restructure Recommendations & Organizational Chart
- 5-Year Strategic Directions/Goals, Actions/Strategies & Outcomes/Objectives
- Timeline, Responsible Parties & Costs
- Templates for Monitoring Success and Key Performance Indicators
- Quarterly Follow-Up Facilitation Services for Accountability
- Considerations for Next Strategic Planning Process

During the process, a City of Port Washington strategy committee defined the following mission, vision, core values, and strategic directions:

VISION: The Premier Community on the Great Lakes.

MISSION: We are a welcoming destination for living, working, and visiting that capitalizes on our strengths, provides quality services, and empowers diverse community engagement.

CORE VALUES:

- **Accountable:** We are results-driven, responsive to community needs, and deliver on our responsibilities on time and on budget.
- **Innovative:** We recognize that our work does not stand still and requires us to experiment and explore new frontiers as we deliver our services.
- **Trustworthy:** We strive to have open dialogue with citizens and stakeholders and act with integrity to fulfill our commitments.
- **Industrious:** We acknowledge both the value of existing good practices and the need to try new things and unite them with an ethic of hard work, efficiency, and responsible use of resources.
- **Friendly:** We foster relationships that make our community a warm and inviting place where people want to live, raise children, and support their neighbors.

STRATEGIC DIRECTIONS:

1. Pursuing Stakeholder Alignment Through Communication
2. Creating Accountability Through Policies & Procedures
3. Ranking Priorities to Identify Funding Sources
4. Catalyzing Development to Generate Revenue

This document provides an overview of the new strategic plan, which will guide the City of Port Washington's work for the next five years. Details on the planning process and supporting documents from that process are available in the appendices.

OVERVIEW

Port Washington is the county seat of Ozaukee County, Wisconsin, which is in the east central portion of the state on the shores of Lake Michigan. It first emerged as a port community in the 1830s and has grown to nearly 12,000 residents. It is part of the Milwaukee Metropolitan Statistical Area and sits about 25 miles north of downtown Milwaukee, but it retains its distinct town core and sits at some distance from the most urbanized parts of the area.

Ozaukee County's population has grown steadily in recent decades as the Milwaukee metropolitan area expands outward. On its southern end, Mequon, an affluent Milwaukee suburb, is its largest city; south and west of Port Washington lie growing suburban and exurban communities such as Cedarburg, Grafton, and Mequon. To the north, the county becomes more rural in character. As the community grows and broader economic and demographic trends emerge, it stands at a significant potential turning point. Community stakeholders recognized the need for an intentional process to strategize for the future. See the appendix titled Background Information for a thorough overview of the backdrop against which Port Washington undertook this plan.

In November 2021, the City of Port Washington engaged Northspan to facilitate a strategic plan. After going many years without a formal strategic planning process and recent transitions to a new mayor and city administrator, Port Washington sought to the facilitation of a strategic plan and a supporting change management process for city departments. City leadership sought to engage the Common Council, city staff, and a range of community stakeholders in a process to lay the groundwork for future accountability and success.

Participants in the strategy committee included the mayor, city administrator, seven alderpersons on the Common Council, 14 city department heads, and 13 community members who added varied perspectives to the process, including representatives from the private sector, county-level officials, and high school students. Additional stakeholders participated in a survey and subsequent engagement workshop near the start of the process, and preparation work built off surveys of the general public completed in the previous year.

The group’s strategic planning process included a stakeholder survey and city leadership interviews in December, a stakeholder engagement session and four strategic planning workshops in January, and a period for public comment in February before final approval on March 1, 2022. The new strategic plan seeks to bring together many of the city’s activities behind a common vision, mission, and core values and provide concrete, measurable steps with which to make the vision a reality.

STRATEGIC PLAN 2022-2026

This strategic plan is the culmination of a planning process conducted from December 2021 to March 2022. The planning established a new vision, mission, core values, and strategic directions for the City of Port Washington. It also established action steps and outcomes to advance the strategic directions.

VISION: The Premier Community on the Great Lakes.

MISSION: We are a welcoming destination for living, working, and visiting that capitalizes on our strengths, provides quality services, and empowers diverse community engagement.

CORE VALUES:

We are...

- **Accountable:** We are results-driven, responsive to community needs, and deliver on our responsibilities on time and on budget.
- **Innovative:** We recognize that our work does not stand still and requires us to experiment and explore new frontiers as we deliver our services.
- **Trustworthy:** We strive to have open dialogue with citizens and stakeholders and act with integrity to fulfill our commitments.
- **Industrious:** We acknowledge both the value of existing good practices and the need to try new things and unite them with an ethic of hard work, efficiency, and responsible use of resources.
- **Friendly:** We foster relationships that make our community a warm and inviting place where people want to live, raise children, and support their neighbors.



STAKEHOLDER STRATEGY IDEAS

- In the arena of public space and amenities, we have learned we are underutilizing Port's incredible resources.
- In the arena of marketing and public relations, there is value in clear, direct communication and unified messaging.
- In the arena of proactive property development, current efforts are not consistent with community and manufacturing growth needs.
- In the arena of revenue optimization, there is a need and opportunity to steer revenue generation to priorities.
- In the arena of education and business partnerships, we have learned that there is an access, awareness, and opportunity gap.

PRACTICAL VISION

- Priority-Driven Development
- Collaborative Private/Public Partnerships
- Purposeful & Engaging Public Spaces
- Safe & Accessible Downtown
- Critical Infrastructure Investments
- Comprehensive Civic Communication
- A Destination Workplace
- Reliable & Sustainable Emergency Services

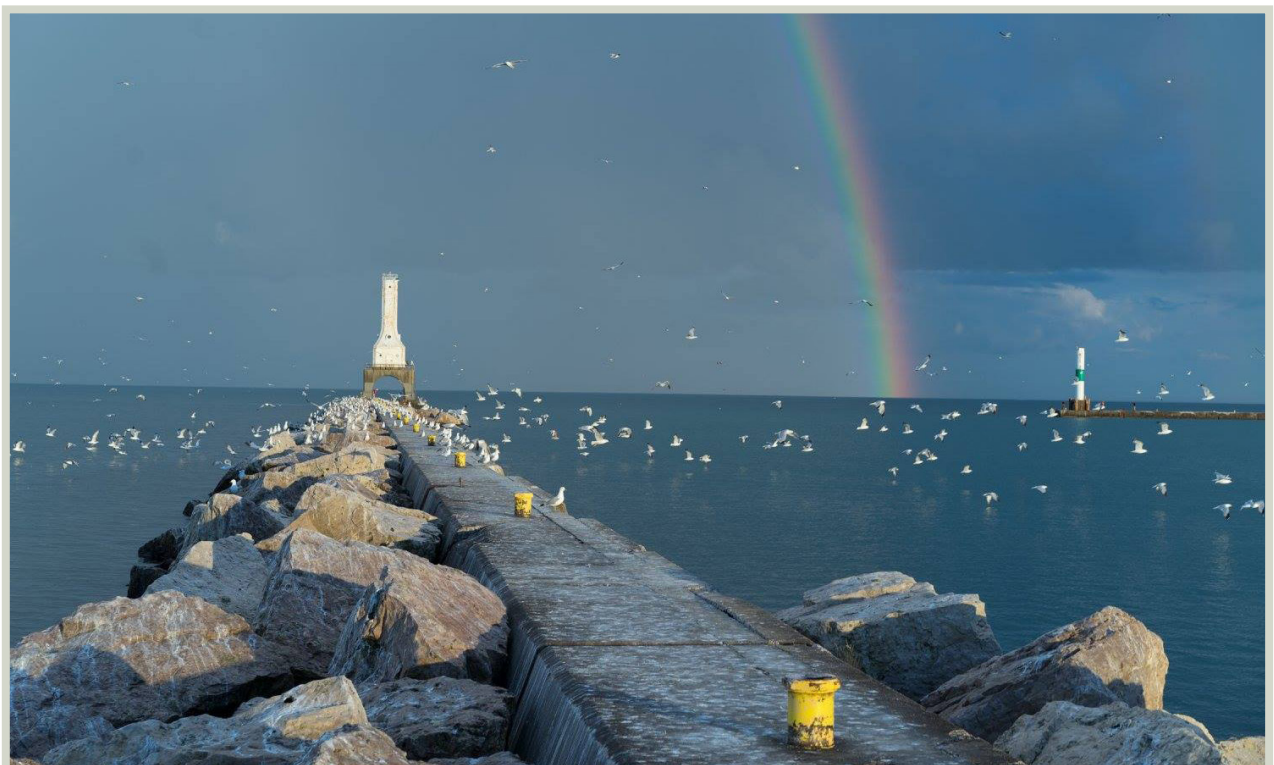


UNDERLYING CONTRADICTIONS

- Unclear vision limits stakeholder engagement and focus
- Unwillingness to let go of past perceptions prevents bold change
- Financial constraints challenge stakeholder approaches
- Misinformation prevents understanding and promotes distrust
- Land constraints limit ability to grow and require tough choices
- Conflicting priorities stifle execution
- Underdeveloped city procedures create apathy and lower expectations, reducing progress and limiting results

STRATEGIC DIRECTIONS

1. Pursuing Stakeholder Alignment Through Communication
2. Creating Accountability Through Policies & Procedures
3. Ranking Priorities to Identify Funding Sources
4. Catalyzing Development to Generate Revenue



SD1. PURSUING STAKEHOLDER ALIGNMENT THROUGH COMMUNICATIONS

DEFINITION

This strategic direction recognizes a need for the City of Port Washington to communicate its actions and metrics to the public more effectively. It builds policies, procedures, and assessment tools to ensure a successful implementation. The strategic direction aims to foster increased public and staff engagement, understanding of the city's activity, and recognition of the city's strategic priorities.

ACTION STEPS

1. Hire with focused skillset for communications
2. Create standard policies and procedures for communications and implement change management training for staff
3. Assess and select analytics tool to create dashboard
4. Determine digital platform for city communications
5. Build baselines for success indicators
6. Assess and determine methodology and cadence for feedback
7. Use data to assess and plan annually, both internally and externally

OUTCOMES

- Increased and focused use of city's digital platforms
- Increased customer satisfaction
- Increased staff engagement
- Increased public participation and engagement

SD2. CREATING ACCOUNTABILITY THROUGH POLICIES AND PROCEDURES

DEFINITION

This strategic direction focuses on internal policies, procedures, and processes within the government of the City of Port Washington. It recognizes the fractured nature of current efforts and need for greater accountability across all departments. It creates a framework to address these concerns and strives to increase employee engagement, performance, and execution of key performance indicators.

ACTION STEPS

1. Establish uniform employee evaluation process
2. Create policy process to assess and update city ordinances
3. Create professional development plans
4. Each department creates and approves its standard operating procedures
5. Develop and choose an engagement assessment (e.g., Q12)
6. Develop decision tree for accountability

OUTCOMES

- Higher level of employee performance
- Highly engaged employee base
- Reduction of legal costs
- Key performance indicators met

SD3. RANKING PRIORITIES TO IDENTIFY FUNDING SOURCES

DEFINITION

This strategic direction acknowledges the opportunities and challenges that come from Port Washington's ongoing growth amid a constrained fiscal environment. It requires each city department to develop a budgeting philosophy and develop key performance indicators to align limited resources with the foremost priorities. If successful, the city will better be able to leverage existing and new sources of funding to meet its goals and build public support for its investments.

ACTION STEPS

1. Develop budgeting philosophy for each department
2. Identify KPIs for dashboard and publish it
3. Develop partnerships with philanthropic partners to collaborate on priorities
4. Implement human capital development standards for all staff and elected officials
5. Develop cost of service model
6. Increase cash spending on capital projects by 25% over 5 years

OUTCOMES

- Budgeting dashboard and philosophy in place and understood across departments
- Long-term and proactive capital, maintenance, and asset plan in place
- Cost of service model in place
- Residents are supportive of expenditures, leading to a high net promoter score (NPS) of people recommending the city

SD4. CATALYZING DEVELOPMENT TO GENERATE REVENUE

DEFINITION

This strategic direction seeks to capitalize on Port Washington's potential for greater growth in a way that is proactive, transparent, and predictable for users. It strives to update the city's practices at several stages of the development process and more actively pursue a variety of opportunities. Its aims include a clearer process for developers, increased investment, and resulting growth in population, business formation, and property values.

ACTION STEPS

1. Finish downtown plan
2. Define city intent/goals for new development
3. Refine process for development review
4. Expand opportunities for public-private partnerships for affordable housing
5. Identify underperforming properties and market to developers
6. Develop design standards for development and architectural review process
7. Develop new zoning code
8. Utilize Community Development Authority to meet regularly and redevelop underperforming properties
9. Monitor and pursue opportunities for state/federal funding and promote them

OUTCOMES

- More diversity of, location for, and attractiveness of development
- Developers and citizens express satisfaction with development process and timeline
- Deliberative TIF process used proactively for appropriate projects
- Population, number of businesses, and property values (value per acre) all grow
- Less need to borrow
- Redeveloped commercial corridors

APPENDIX 1

Strategic Planning Process

APPENDIX 1

STRATEGIC PLANNING PROCESS

The City of Port Washington has prepared this 5-year strategic plan to guide its activities and achieve accomplishments consistent with the group's vision and mission. The strategic process steps, session dates, and agendas are included as an attachment, as are the results of the sessions that followed.

PROCESS STEPS

1. Collection of background information
2. Staff and stakeholder survey
3. Pre-workshop interviews
4. Internal and external analysis
5. 01.03.22 Stakeholder Engagement Workshop
6. 01.04.22 Strategic Planning Session 1 of 4
7. 01.05.22 Strategic Planning Session 2 of 4
8. 01.17.22 Vision Mission Core Values MiniSurvey
9. 01.20.22 Strategic Planning Session 3 of 4
10. 01.21.22 Strategic Planning Session 4 of 4
11. 01.26.22 Draft Strategic Plan Review & Feedback
12. 02.07.22 5-Year Strategic Plan posted for public comment
13. 02.18.21 Quarter 1 Action Planning Workshop
14. 02.21.22 Closing of public comment period
15. 03.01.21 Strategic Plan Board Presentation
16. Complete a 90-day check-in
17. Subsequent quarterly and annual planning

COLLECTION OF BACKGROUND INFORMATION

The strategic planning process began with a series of meetings and communications with City of Port Washington staff that provided contact information, materials detailing the organization's work and impact, and clarification over the plans for the engagement. This phase also included the collection of background demographic, economic, and health-related data from the US Census American Community survey to provide an overview of the current situation and recent trends in Port Washington and surrounding areas. Combined with extensive background materials and survey work provided by the city, this information was included in a context-grounding presentation in the Stakeholder Engagement Workshop and first strategic planning session.

STAFF AND STAKEHOLDER SURVEY

The City of Port Washington solicited input from staff, alderpersons, strategy committee members, and community stakeholders in a survey completed in December 2021. The survey received 63 responses. Participants were asked to rate the city on a variety of perceptions and services in a format that aligned with previous public survey work, brainstorm ideas for the practical vision and underlying contradictions workshops within the strategic planning process, and identify the city's strengths, weaknesses, opportunities, and threats. Full results of the survey are available in the appendix titled Port Washington Staff and Stakeholder Survey Summary 12.31.21.

PRE-WORKSHOP INTERVIEWS

Prior to the start of the strategic planning process, Northspan conducted interviews with the City of Port Washington's mayor, alderpersons, city administrator, and department heads. These 22 interviews drew out insights on members' roles in the strategic planning process, identified things that were going well, and identified potential issues for the community. It explored participants' perceptions on the process, their thoughts on leadership practices, and fostered thought on training and succession planning. A complete survey summary is available in the appendix titled Port Washington Pre-Workshop Interviews Summary.

INTERNAL AND EXTERNAL ANALYSIS

Northspan reviewed an array of past reports, studies, and surveys completed by the City of Port Washington and augmented it with its own research on economic and demographic trends for the city and surrounding areas. This research was presented at the Stakeholder Engagement Workshop and at the first Strategic Planning Session, and some information was added in response to questions at these sessions. Details from this section are included in the main text of this report.

STAKEHOLDER ENGAGEMENT WORKSHOP

AGENDA | January 3, 2022 | 2:00 – 5:00 PM

- 2:00 Welcome, Agenda, & Introductions
- 2:20 Context Presentation
- 3:10 Strategy Ideas Workshop
- 4:45 Next Steps
- 5:00 Adjourn

On January 3, Northspan facilitated a stakeholder engagement workshop that reached a variety of community members, including some who participated in all strategic planning workshops and others who did not. These sessions gave these participants the opportunity to receive and react to the information in the context presentation and provide their strategy ideas to inform the subsequent workshops. The stakeholder strategy ideas are available in the appendix titled Port Washington Stakeholder Strategy Idea Outcomes 01.03.22.

STRATEGIC PLANNING SESSION 1 OF 4

AGENDA | January 4, 2022 | 8:00 AM – 12:00 PM

- 8:00 Welcome, Agenda, & Introductions
- 8:20 Context Presentation
- 9:10 Practical Vision Workshop
- 11:45 Next Steps
- 12:00 Adjourn

On January 4, the strategy committee met for the first time and received a presentation on the results of the Stakeholder Engagement Workshop, survey results, and broader economic and demographic trends in Port Washington and the surrounding area. It then developed a practical vision for the strategic planning process. Elements of the practical vision included:

- Priority-Driven Development
- Collaborative Private/Public Partnerships
- Purposeful & Engaging Public Spaces
- Safe & Accessible Downtown
- Critical Infrastructure Investments
- Comprehensive Civic Communication
- A Destination Workplace
- Reliable & Sustainable Emergency Services

STRATEGIC PLANNING SESSION 2 OF 4

AGENDA | January 5, 2022 | 8:00 AM – 12:00 PM

- 8:00 Welcome, Agenda, & Introductions
- 8:20 Underlying Contradictions Workshop
- 10:00 Strategic Directions Workshop
- 11:40 Next Steps
- 12:00 Adjourn

On January 5, Northspan facilitated a session with the committee that focused on blocks that prevent the City of Port Washington from reaching its vision and strategic directions to overcome those blocks and barriers.

UNDERLYING CONTRADICTIONS AKA BLOCKS

Participants identified seven contradictions or blocks that they believed held back the City of Port Washington. These blocks are available in the appendix in the document titled Port Washington PV UC SDs 01.04 and 01.05.22.

UNDERLYING CONTRADICTIONS

- Unclear vision limits stakeholder engagement and focus
- Unwillingness to let go of past perceptions prevents bold change
- Financial constraints challenge stakeholder approaches
- Misinformation prevents understanding and promotes distrust
- Land constraints limit ability to grow and require tough choices
- Conflicting priorities stifle execution
- Underdeveloped city procedures create apathy and lower expectations, reducing progress and limiting results

STRATEGIC DIRECTIONS

With the contradictions in mind, the participants then moved to identify four strategic directions that they believe will allow the City of Port Washington to overcome these blocks. These strategic directions are available in the appendix in the document titled Port Washington PV UC SDs 01.04 and 01.05.22.

STRATEGIC DIRECTIONS

1. Pursuing Stakeholder Alignment Through Communication
2. Creating Accountability Through Policies & Procedures
3. Ranking Priorities to Identify Funding Sources
4. Catalyzing Development to Generate Revenue

STRATEGIC PLANNING SESSION 3 OF 4

AGENDA | January 20, 2022 | 1:00 – 4:00 PM

- 1:00 Welcome & Introductions
- 1:30 Mission
- 2:20 Vision
- 3:10 Core Values
- 4:00 Next Steps & Adjourn

In this session, the strategy committee revisited the City of Port Washington’s mission, vision, and core values. An initial mini survey of the strategy committee that helped guide this conversation is available in the appendix titled Port Washington Vision Mission Core Values MiniSurvey Summary 1.17.22.

STRATEGIC PLANNING SESSION 4 OF 4

AGENDA | January 21, 2022 | 8:00 AM – 12:00 PM

- 8:00 Welcome & Introductions
- 8:25 Strengths, Weaknesses, Benefits, and Dangers
- 8:30 Focused Implementation
 - Current Reality, Success Indications, Actions
 - Timeline
 - Priority
 - Next Steps
- 11:40 90-Day Plan Teams
- 12:00 Adjourn

On January 21, Northspan facilitated a final workshop with the strategy committee. In this session, participants detailed outcomes and accomplishments that could move HLUW toward its strategic directions and placed these actions on a timeline. The survey prior to Session 3 also asked respondents to identify the City of Port Washington's strengths and weaknesses, along with the benefits and dangers of success of the strategic plan, which helped inform this workshop. The results of this survey are available in the appendix titled Port Washington Vision Mission Core Values MiniSurvey Summary 1.17.22.

ACCOMPLISHMENTS

The City of Port Washington defined its current reality, identified success indicators, and developed outcomes and accomplishments that will allow the organization to move from current reality to success. These accomplishments and the ideas that led to their creation are available in the appendix in the document titled Port Washington Current Reality, Success Indicators & Actions 1.21.22. The City of Port Washington then further defined the strategic plan timeline, which is available in the appendix titled Port Washington Strategic Plan Timeline 1.21.22.



APPENDIX 2

Background Information

APPENDIX 2

BACKGROUND INFORMATION

Background preparation for the strategic planning process included an analysis of existing plans reports completed by or for the City of Port Washington, along with a thorough demographic and economic assessment. This information was presented at both the Stakeholder Engagement Workshop and the first Strategic Planning Session.

PREVIOUS STUDIES

Northspan reviewed the following existing materials to inform the context of the process:

- City of Port Washington Comprehensive Plan (2008)
- Downtown Parking Study (2014)
- Community Senior Center Feasibility Study (2015)
- Economic Development Plan (2017)
- Marina Study (2017)
- Planning and Economic Development Annual Report (2020)
- First Response Report (2021)
- Human Resources Audit and Assessment (2021)
- Comprehensive Outdoor Recreation Plan (2021)
- Future Land Use Update (2021)
- 2022 Annual Budget

The reports and studies showed considerable intentional thought given to Port Washington's future over the past 15 years. They create both a broader framework and target community amenities or challenges that remain priorities, including use of its historic downtown, a unique asset in the marina, and a plan for outdoor recreation. The documents also demonstrated a concern for the financial implications of many decisions and sought more efficient uses of city resources.

These materials often aligned with opinions that emerged through the strategic planning process. Some, such as the comprehensive plan, are now somewhat dated and would benefit from updates. Piecemeal updates have been made to some of these materials; for example, the 2021 Future Land Use Update outlines land use changes that seek to modernize one aspect of the comprehensive plan but did not overhaul the entire zoning code.

Port Washington's growth has outpaced projections in some of the earlier documentation, and the city continues to enjoy substantial levels of development despite land constraints. Available properties for commercial or industrial development are not well advertised or readily available in a single place. Above all, while many of the plans include relevant and important recommendations, they lack a unifying framework that can help advance all of them in tandem. This strategic planning process seeks to bring them together and pull out their most relevant points.

DEMOGRAPHIC DATA AND ECONOMIC TRENDS ANALYSIS

In addition to reviewing existing studies, Northspan completed an analysis of demographic data and economic trends in Port Washington and surrounding areas. This research provides a snapshot of local economic conditions and how they have changed over time, giving some sense of what Port Washington's future might look like.

Population

According to the 2020 US Census, Port Washington has a population of 12,353 residents. This is an addition of over 1,000 residents since 2010, and its 10.1% growth rate is the highest of any community in Ozaukee County and outstrips population growth in most of the country. The 2010s was the first decade in recent history in which Port Washington achieved this distinction, as it had significantly lagged explosive county growth in the 1980s and largely mirrored it in the 1990s and 2000s before continuing its rapid pace while the county tailed off in the 2010s.

Table 1: Port Washington Population Change from 2010 to 2020

	2010	2020	% Change
Port Washington	11,220	12,353	10.1%
Ozaukee County	86,395	91,503	5.9%
Wisconsin	5,687,006	5,893,718	3.6%

Source: US Census, 2020.

The vast majority of Port Washington's population growth took place in the 65-plus age bracket, as the city added 490 of these residents. It saw more modest growth in the 35-64 age group, was effectively flat among residents under 18, and lost population among residents ages 18-34. These trends are not unusual for rural or semi-rural Midwestern communities; Ozaukee County, despite its faster overall growth rate, saw substantial loss in the under 18 and 35-64 age groups and comparable growth in the 65+ bracket, and owes its growth relative to the city to the 18-34 category.

Table 2: Population Change by Age Group, 2010 to 2019

	Port Washington				Ozaukee County			
	2010	2019	% Change	% of Total	2010	2019	% Change	% of Total
Under 18	2,603	2,606	0.1%	22.2%	20,717	19,066	-8.0%	20.8%
18-34	2,417	2,263	-6.4%	19.2%	14,268	16,395	14.9%	17.9%
35-64	4,637	4,813	3.8%	40.9%	8,369	36,092	-5.9%	39.4%
65+	1,489	2,079	39.6%	17.7%	12,591	17,044	35.4%	18.6%

Source: US Census American Community Survey, 2019.

A breakdown of the age groups by subcategory sheds further light on these trends. In the under-18 age bracket, population growth has been heavily concentrated in the younger age groups, while it has been declining in the high school ages; the city is losing more and more of its population between ages 18-24, but tends to see stabilization past age 25, as families look to settle into the city. The most pronounced growth occurred in the 65-74 age bracket, driving the rapid growth in that overall category.

Table 3: Population Change by Age Subgroup, 2010 to 2019

	2010	2019	% Change
Under 5	5.4%	5.4%	5.3%
5-9	6.4%	6.8%	12.7%
10-14	7.3%	7.1%	2.2%
15-17	4.2%	2.8%	-29.2%
18-24	9.3%	5.9%	-32.7%
25-34	12.4%	13.3%	13.4%
35-44	13.5%	14.5%	13.5%
45-54	15.5%	11.7%	-19.9%
55-64	12.6%	14.7%	22.4%
65-74	5.6%	9.9%	86.1%
75-84	5.3%	5.4%	7.1%
85+	2.4%	2.4%	4.1%

During the engagement process, stakeholders asked for added information on changes over a longer time period. Northspan subsequently pulled age group data from the 1980 Census for the three current census tracts that now include the City of Port Washington. (Direct comparison historical data for the city itself was unavailable.) When compared to US data over the same period, the data shows similar trends, with steady declines in the share of the population in younger age brackets and substantial growth in older groups. These changes reflect both a decline in the birth rate and the generally longer lifespans attained over this 40-year period. However, these trends were more pronounced in Port Washington than in the entire country, underscoring the extent of the shift in Port Washington. The composition of the population in the community is clearly aging faster than the national average. Communities that have bucked this trend tend to have seen either significant immigration (as immigrants are a population group that trends younger) or significant housing development that attracts new, younger families with children.

Table 4: Population Change by Age Group in Port Washington and the United States, 1980 to 2019

	Port Washington Tracts		USA		% Change PW	% Change USA
	1980	2019	1980	2019		
Under 18	30.4%	20.5%	28.2%	22.6%	-32.6%	-19.8%
18-34	28.1%	19.9%	29.7%	23.3%	-29.1%	-21.5%
35-64	31.2%	40.9%	31.0%	38.4%	31.3%	24.0%
65+	10.3%	18.7%	11.3%	15.6%	80.4%	38.4%

Source: US Census American Community Survey, 2019; US Census, 1980.

Port Washington added 399 households over the decade of the 2010s, a pace that outstripped both population growth and household growth in the county. This shift is part of a broader trend toward smaller households across the entire nation, as the elderly live longer lives and some younger families delay or forego childbirth, particularly in situations of economic uncertainty. Compared to both Ozaukee County and the nation, Port Washington exhibits a healthy pace of growth in families and married couples, though the number of households with children declined somewhat over the 2010s, even as that population remained stable. Household size in the US, which was 3.14 in 1980 and is now 2.67, has always tended to be larger than that of Port Washington, as in many more urbanized communities across the country.

Table 5: Port Washington and Ozaukee County Household Characteristics, 2010 to 2019

	Port Washington			Ozaukee County		
	2010	2019	% Change	2010	2019	% Change
Households	4,646	5,045	8.6%	33,856	35,807	5.8%
Avg. Household Size	2.41	2.33	3.5%	2.55	2.56	0.1%
Families	2,957	3,132	5.9%	24,152	25,228	4.5%
Married Couple	2,304	2,545	10.5%	20,959	21,454	2.4%
With 1+ Children Under 18	1,451	1,362	-6.1%	10,940	10,586	-3.2%

Source: US Census American Community Survey, 2019.

Port Washington is a predominantly white community. It grew somewhat more diverse over the decade of the 2010s, though the pace was gradual and not heavily concentrated in any one racial group. The only groups with high rates of growth tended to be the smallest categories, leaving them liable to large shifts due to a small sample size. The Hispanic population, which was already the largest among people of color, showed the largest absolute increase and grew at a rate of 13%. All groups of color have grown steadily over recent decades, as the city's population was over 98% white in 1980.

Table 6: Racial Composition of the Population of Port Washington, 2010 to 2019

Race	2010	2019	% Change
White	95.3%	94.2%	3.7%
Black	0.9%	0.8%	-6.7%
Native American	0.0%	0.5%	2900.0%
Asian	1.5%	0.9%	-33.7%
Some Other Race	0.3%	1.4%	412.5%
2+ Races	1.4%	2.1%	63.0%
Hispanic/Latino	3.5%	3.8%	13.0%

Source: US Census American Community Survey, 2019.

Income, Poverty, and Education

The median household in Port Washington had an income of \$68,187 in 2019. This figure is noticeably higher than the statewide figure of \$61,747, though it lags Ozaukee County, which at \$85,215 is the second-wealthiest county in Wisconsin. When adjusted for inflation, Port Washington's median income grew negligibly over the course of the past decade, a somewhat concerning trend given statewide growth of around 2.1%, although Ozaukee County as a whole declined 3%. This seeming stagnation is likely a product of an aging population and comparatively less urban expansion in the wake of the 2008 financial crisis, a trend that would typically drive both population and income growth.

Table 7: Median Household Income in Port Washington and Comparison Areas, 2010 and 2019

	2010	2019	% Change
Port Washington	\$ 67,763	\$ 68,167	0.6%
Ozaukee County	\$ 87,895	\$ 85,215	-3.0%
Wisconsin	\$ 60,473	\$ 61,747	2.1%

Source: US Census American Community Survey, 2019.

The poverty rate in Port Washington declined substantially over the decade of the 2010s and is just over one half the national rate. Ozaukee County saw an increase from very low poverty levels in 2010, though it still remains quite low by national standards and is lower than Port Washington's rate. This decline in poverty is likely attributable to both changing demographics and to rising home prices that make it difficult for low-income individuals to afford homes in certain communities. The decline in the most recent decade marks a reversal, as Port Washington's poverty rate had been as low as 3% in 1980.

Table 8: Poverty in Port Washington and Comparison Areas, 2010 and 2019

	2010	2019	% Change
Port Washington	8.7%	6.0%	-31.0%
Ozaukee County	4.5%	5.3%	17.8%
Wisconsin	11.6%	11.3%	-2.6%

Source: US Census American Community Survey, 2019.

Like Ozaukee County, Port Washington has a well-educated workforce, with very strong high school graduation rates and college attendance that surpasses statewide figures. These advantages slip somewhat among bachelor's and advanced degrees, where Ozaukee County's rate is nearly double Port Washington's, which is closer to matching that of the state. As in most communities, education attainment has steadily increased over recent decades, climbing from a high school completion rate of 87% and a college completion rate of around 25% in 1980.

Table 9: Educational Attainment in Port Washington and Comparison Areas, 2010 to 2019

Education	Port Washington	Ozaukee County	Wisconsin
Less than high school	4.0%	3.2%	7.8%
High school degree	96.1%	96.8%	92.2%
Some college	70.4%	76.9%	61.6%
Bachelor's or more	36.1%	49.0%	30.1%
Advanced degree	10.5%	19.0%	10.4%

Source: US Census American Community Survey, 2019.

Housing

As of 2019, there are 5,244 housing units in Port Washington. Housing growth was fairly evenly distributed between owner- and renter-occupied units, a trend that would appear to correlate with other demographic shifts in the city such as smaller households and limited income growth. New development, which netted 277 units for the city, did not keep pace with the addition of 399 households in the community, resulting in a tighter market for homes and a significant decrease in the vacancy rate. 33.6% of units in Port Washington are rentals, a figure that runs just behind the national average of 36%. While the percentage of renter-occupied units has grown by 1.4% since 2010, this pace is slower than the national rate of an increased ship in renter-occupied housing, which climbed from 33.3% in 2010 to its current level at 36%.

Table 10: Port Washington Housing Unit Occupancy, 2010 to 2019

	2010	% Total	2019	% Total	% Change
Owner Occupied	3,046	61.3%	3,281	62.6%	7.7%
Renter Occupied	1,600	32.2%	1,764	33.6%	10.3%
Total Occupied	4,646	93.5%	5,045	96.2%	8.6%
Vacant	321	6.5%	199	3.8%	-38.0%
Total Units	4,967		5,244		5.6%

Source: US Census American Community Survey, 2019.

While limited growth in the number of housing units brings some benefits for residential upkeep and can increase property values, it also runs the risk of inhibiting development and population growth, or of pricing families out of the community. Additionally, the trend toward a larger number of renter households is a more recent phenomenon, as the city had a substantially higher proportion of renters in the 1980 and 1990 censuses. This shift was likely driven by the development of new single-family homes.

Table 11: Owner-Occupied Housing Unit Characteristics

Port Washington	Ozaukee County	
Median Listing Price (2021)	\$250,000	\$389,900
Median Sale Price (2021)	\$270,200	\$425,000
Median Year Built	1969	1976
Homes with a Mortgage	73.4%	66.9%
Mortgage More Than 30% of Income	21.4%	19.4%
Mortgage More Than 50% of Income	10.1%	7.8%

Source: US Census American Community Survey, 2019.

Owner-occupied homes in Port Washington constitute just over 60% of the housing stock. Prices in the city are generally more affordable than in Ozaukee County, which has some of the highest home prices in Wisconsin. About 20% of homeowners spend more than 30% of their household income on their mortgages, a commonly accepted measure of cost burden among residents. Nearly 40% of renters meet this standard for cost burden.

Table 12: Rental Housing Unit Characteristics

	Port Washington	Ozaukee County
Median Gross Rent	\$890	\$927
More Than 30% of Income	38.0%	37.7%
More Than 50% of Income	17.1%	18.1%

Source: US Census American Community Survey, 2019.

Questions regarding the tax impact of rental versus single-family housing emerged through the engagement process. [A comprehensive review of related literature for the 2015 Madison-based Capital Area Regional Planning Commission](#) sought to clarify many of these issues by asking the following questions:

1. Does multiple family rental housing support the service demands it creates?
2. Is there a relationship between housing density and negative community impacts?
3. Is there evidence that neighborhoods or multifamily developments are more stable and lasting when multifamily and/or rental housing units are below a particular threshold as a percentage of total units in an area?
4. What strategies assure lasting quality in multifamily living environments?

Its findings do not provide definitive answers, but they do provide guideposts to policymakers in Wisconsin cities as they ponder these questions. The wide variety of apartment development configurations, cost levels, and locations make sweeping conclusions about their costs and benefits nearly impossible. Multifamily developments often pay higher property tax rates, though smaller unit sizes can decrease revenue per unit; if anything, they tend to increase neighboring property values, and impacts on emergency services are relatively stable when compared to new single-family development. Increased density can lower per-unit housing cost and spare cities the need for investments in roads and utilities for less concentrated single-family development, and this benefit is often left out of cities' cost-benefit calculations. On the other hand, rental housing is less somewhat positively correlated with civic engagement and community participation than owner-occupied housing. Ultimately, the report concludes that characteristics of new housing developments, from design to management, are far more impactful on community outcomes than the direct breakdown of rental versus owner-occupied housing.

Labor Force

Port Washington's labor force remained relatively level between 2010 and 2019, declining slightly while overall employment increased due to declining unemployment. Trends in Ozaukee County are similar, though somewhat more pronounced. Prior to the disruptions of the Covid-19 pandemic, the city's unemployment rate had dipped below 4%, which is a common threshold for full employment, while it was even lower in Ozaukee County. An increase in the number of people not in the labor force is largely attributable to the aging population.

Table 13: Port Washington and Ozaukee County Labor Force Characteristics, 2010 to 2019

	Port Washington			Ozaukee County		
	2010	2019	% Change	2010	2019	% Change
16+ Population	8,899	9,364	5.2%	67,868	71,924	6.0%
In Labor Force	6,528	6,482	-0.7%	47,817	48,474	1.4%
Employed	6,222	6,235	0.2%	45,616	47,213	3.5%
Unemployed	306	247	-19.3%	2,177	1,256	-42.3%
Unempl. Rate	4.7%	3.8%	-18.7%	4.6%	2.6%	-43.1%
Not in Labor Force	2,371	2,882	21.6%	20,051	23,450	17.0%

Source: US Census American Community Survey, 2019.

The Covid-19 pandemic upended the local labor market, but its effects were largely temporary. State of Wisconsin data for Ozaukee County shows a spike of over 10% in the unemployment rate between October and April 2020, along with a decline in the labor force of over 2,000 individuals. Unemployment rebounded rapidly and has continued to decrease since, reaching record lows at 1.9% by October 2021. The labor force has been somewhat slower to recover and still sat about 500 people lower in October 2021 than it had in October 2019. While many of the workers who exited the labor market for health-related reasons or to care for family have since returned, another group opted for earlier retirements and is unlikely to return. Overall, the pandemic appears to have exacerbated existing trends and created an exceptionally tight labor market in which workers have higher levels of bargaining power and employers are being forced to think creatively to meet their needs.

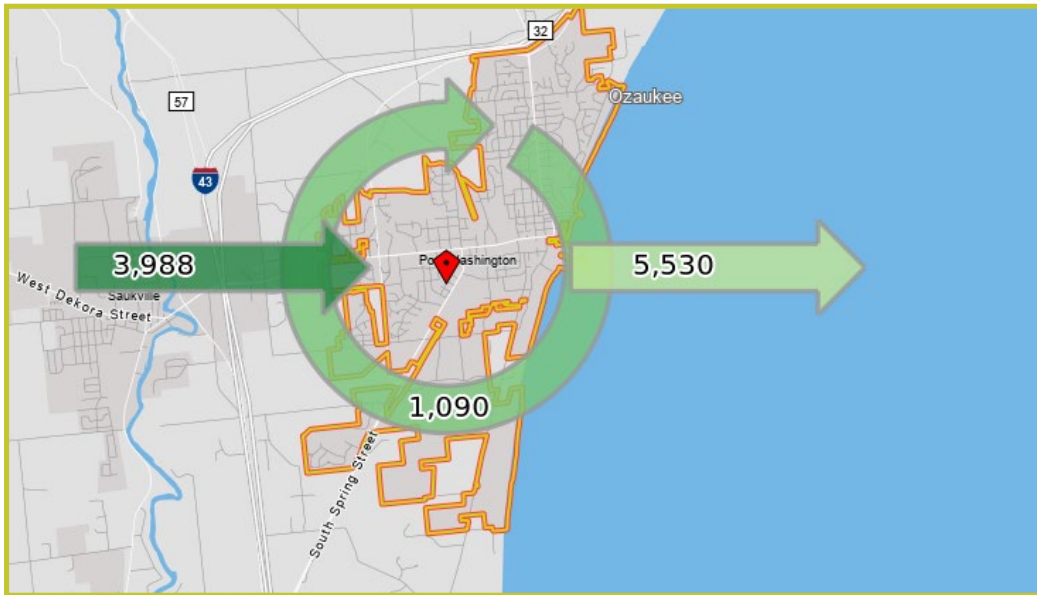
Table 14: Ozaukee County Labor Force Data Through the Covid-19 Pandemic

	Oct 2019	Apr 2020	Oct 2020	Apr 2021	Oct 2021
Labor Force	49,125	46,926	47,963	47,999	48,617
Employed	47,846	40,771	46,082	46,332	47,689
Unemployed	1,279	6,155	1,881	1,667	928
Unempl. Rate	2.6%	13.1%	3.9%	3.5%	1.9%

Source: Job Center of Wisconsin Local Area Unemployment Statistics, 2021.

As with many communities of its size, Port Washington is part of a dynamic jobs market in which many workers travel to and from neighboring communities. According to 2019 Census data, 16.5% of Port Washington workers have jobs in the city itself, and the rest commute elsewhere. The city sees a net loss of 1,542 workers on any given day, as 5,530 Port Washington residents leave the city for work, while 3,988 enter it from neighboring communities. Port Washington's economy is most closely interrelated with Milwaukee itself, which is both the top place of work for its residents (outpacing even Port Washington itself) and is home to the largest number of non-residents working in Port Washington. Grafton, Saukville, and West Bend also see considerable flow of workers back and forth from Port Washington. The flows of other commuters are primarily from north to south, as the city gains more workers from locations such as Belgium, Fredonia, and Sheboygan, while it sees more leave for Mequon, Wauwatosa, and Menomonee Falls.

Figure 1: City of Port Washington Commuter Inflow and Outflow, 2019



Source: US Census OnTheMap, 2019.

The impacts of Covid-19 on these trends remain unclear, though it is likely safe to assume that many residents who work in white-collar professions now can work from home at least some of the time, while some of the incoming workers no longer make their commutes to the city. Given the flows of workers into and out of Port Washington and the composition of its economic base, this is likely a net increase in the number of individuals physically doing their work in the city limits.

Employment Sectors

Education and health care is the largest employment sector in Port Washington and grew rapidly over the 2010s, matching a nationwide trend. Over the course of the decade it surpassed manufacturing, which had long been the city's top employer but saw a net loss in jobs. These two sectors remain by far the largest in Port Washington, together accounting for nearly half of the jobs of Port Washington residents. Aside from education and health care, the largest areas of growth were in finance, insurance, and real estate; professional services; and transportation, warehousing, and utilities. The construction sector showed the largest decline in resident employment, with other losses in smaller sectors subject to greater volatility. Many of these trends map on to national shifts, with growth in the white-collar service sector, transition in manufacturing, and the emergence of the logistics economy.

Table 15: City of Port Washington Employment by Industry, 2010 and 2019

	2010	2010 % Total	2019	2019 % Total	% Change
Education & Health Care	1,200	19.3%	1,576	25.3%	31.3%
Manufacturing	1,413	22.7%	1,254	20.1%	-11.3%
Retail Trade	650	10.4%	802	12.9%	23.4%
Arts, Entertainment, Rec., Accommodation & Food	613	9.9%	586	9.4%	-4.4%
Finance, Insurance & Real Estate	350	5.6%	434	7.0%	24.0%
Professional Services	588	9.5%	425	6.8%	-27.7%
Transportation, Warehousing & Utilities	177	2.8%	274	4.4%	54.8%
Construction	330	5.3%	226	3.6%	-31.5%
Public Administration	196	3.2%	213	3.4%	8.7%
Wholesale Trade	174	2.8%	195	3.1%	12.1%
Other Services	292	4.7%	192	3.1%	-34.2%
Information	180	2.9%	48	0.8%	-73.3%
Agriculture, Forestry, Fishing, Hunting, & Mining	59	0.9%	10	0.2%	-83.1%
Total	6,222		6,235		

Source: US Census American Community Survey, 2019.

At the county level, the manufacturing sector has proved more resilient, as it continued to add jobs and remained the largest employer in Ozaukee County. As at the city level, health care and social assistance experienced an explosive pace of growth, and many other city trends map smoothly on to the county data. Location quotient data, which shows the relative concentration of an industry in a given area to a larger area, shows that Ozaukee County's comparative strengths relative to the state of Wisconsin are most highly concentrated in professional services, manufacturing, and arts, entertainment, and recreation.

Table 16: Ozaukee County Employment by Industry, 2010 and 2019

	2010	2010 % Total	2019	2019 % Total	% Change
Manufacturing	8,216	22.0%	9,495	22.2%	15.6%
Health Care & Social Assistance	4,565	12.2%	6,525	15.3%	42.9%
Retail Trade	4,505	12.0%	4,723	11.1%	4.8%
Accommodation & Food Services	3,381	9.0%	3,991	9.3%	18.0%
Education	3,024	8.1%	3,474	8.1%	14.9%
Professional Services	2,039	5.5%	2,528	5.9%	24.0%
Administrative, Support, Waste Mgmt.	1,946	5.2%	1,806	4.2%	-7.2%
Public Administration	1,678	4.5%	1,638	3.8%	-2.4%
Finance & Insurance	1,838	4.9%	1,458	3.4%	-20.7%
Wholesale Trade	1,488	4.0%	1,411	3.3%	-5.2%
Construction	1,100	2.9%	1,339	3.1%	21.7%
Other Services	1,257	3.4%	1,260	2.9%	0.2%
Arts, Entertainment, Recreation	721	1.9%	964	2.3%	33.7%
Transp. & Warehousing	340	0.9%	681	1.6%	100.3%
Management of Companies	263	0.7%	391	0.9%	48.7%
Information	N/A	N/A	378	0.9%	N/A
Real Estate	281	0.8%	368	0.9%	31.0%
Agriculture, Forestry, Mining, Quarrying, etc.	N/A	N/A	220	0.5%	N/A
Utilities	76	0.2%	90	0.2%	18.4%
Total	37,404		42,740		

Source: US Census American Community Survey, 2019.

Economic Base Analysis

This report provides a brief overview of the Ozaukee County economic base. (This analysis is better conducted at the county level than at the city level, both for data quality and to ensure a broader understanding of the local economy and its opportunities.) It begins by calculating the location quotient of each major industry group. A location quotient shows the relative concentration of employment in an industry relative to a larger comparison area. This analysis compares Ozaukee County to the state of Wisconsin. Location quotients over 1 indicate a relative strength and concentration of employment in an industry, while those under 1 show a relative lack of employment.

A shift-share analysis is a method that subsequently analyzes how a county's location quotients have changed over time. Such an assessment of Ozaukee County shows that transportation and warehousing, utilities, health care and social assistance, and real estate are the sectors in which its comparative advantage has grown over the 2010s. The largest declines in location quotient, meanwhile, occurred in finance and insurance; administrative, support, and waste management services; wholesale trade; and construction. Most other location quotients saw relatively few shifts over the decade.

Table 17: Ozaukee County Location Quotients, 2010 and 2019

Industry	Shift
Transp. & Warehousing	64.8%
Utilities	34.7%
Health Care & Social Assistance	20.5%
Real Estate	15.4%
Education	9.5%
Arts, Entertainment, Recreation	7.8%
Management of Companies	1.1%
Accommodation & Food Services	1.0%
Professional Services	-1.1%
Retail Trade	-1.6%
Manufacturing	-1.6%
Public Administration	-1.6%
Other Services	-1.8%
Construction	-11.0%
Wholesale Trade	-17.2%
Administrative, Support, Waste Mgmt.	-20.3%
Finance & Insurance	-22.6%

Source: US Census American Community Survey, 2019.

Identification of location quotients and their trends allows for the completion of an economic base analysis that sorts the major industry clusters into four categories:

Growing base: industries with high and growing location quotients

Transforming: industries with high, but declining, location quotients

Emerging: industries with low, but growing, location quotients

Declining: industries with low and declining location quotients

Figure 2: Ozaukee County Growing Base, Transforming, Emerging, and Declining Industries

Transforming	Growing Base
Manufacturing Retail Trade Professional Services Other Services	Health Care Accommodation and Food Services Education Arts, Entertainment & Recreation
Declining	Emerging
Administrative, Support, and Waste Mgmt. Public Administration Finance & Insurance Wholesale Trade Construction	Transportation & Warehousing Management of Companies & Enterprises Real Estate Utilities

This analysis gives a general sense of the state and trajectory of the local economy. In Ozaukee County, the growing base reflects the emerging dominance of health care and education, along with a growing service economy providing food, lodging, and entertainment options to both locals and visitors. The transforming sectors include the county’s longtime economic anchor of manufacturing, plus a number of service industry jobs that are shifting their modes of doing business. Declining industries include a variety of smaller services sectors, most of which are subject to the whims of other economic trends. The emerging industries, meanwhile, appear to take advantage of Ozaukee County’s location, using available land near a large metropolitan area to stimulate both residential and industrial growth, and opening opportunities for corporate offices that benefit from the greater Milwaukee area’s large labor pool.

The trends in Ozaukee County are largely related to national trends. Health care and certain service industry jobs are major employers in most areas of the country, and while they are not among the most lucrative jobs (excepting some very well-paid health care jobs), they are generally indicators of a strong quality of life. The logistics industry has grown rapidly, particularly in communities on the fringes of major metropolitan areas, and is a clear growth area. The declining industries are largely those that are downstream from other changes in the economy, while management and real estate would seem to be potential areas for growth considering the county’s demographics. The future of the county’s longtime manufacturing employment base will also have notable implications for its future as some of its major employers seek to adapt to a changing economy.

A historical perspective shows these trends are longstanding. Manufacturing made up 35.7% of the Ozaukee County workforce in 1980, while health care was a mere 6.3%. Retail trade and construction have likewise declined somewhat, while other portions of the service economy show steady growth. Despite that seemingly very large manufacturing workforce in 1980, Ozaukee County actually has a higher location quotient in manufacturing now than it did in 1980, showing just how much the state and national economy has changed over the past 40 years.

Neighboring Communities

Port Washington has numerous neighbors who provide additional context about its situation. Cedarburg and Grafton are both similarly sized communities in the same county, though both are somewhat closer to the core of the Milwaukee metropolitan area. As a result, both have higher incomes and levels of education, though their growth rates are somewhat lower. The City of Hartford, which is one of the few municipalities on the northern fringes of the metropolitan area near Port Washington's growth rate, has a noticeably lower household income and levels of education, a difference perhaps owing to its location far from Lake Michigan.

Other nearby communities provide insights into other potential futures for Port Washington. Mequon, which is on the southern end of Ozaukee County, is among the wealthiest cities in Wisconsin, and shows what a more built-out suburb with natural amenities on the forefront of suburban growth can look like. As a more established community, however, its income growth has now ceased, and its median age is elevated as the first waves of families to move in age in place. Mequon has also relied on large tracts of land with large lot sizes to attain its current character, which may prove more challenging in land-limited Port Washington. West Bend, like Port Washington, is a more mature community whose origins long predate the urban expansion of the Milwaukee area, and its demographics give a sense of what Port Washington might look like should its growth stagnate. Saukville provides a comparable example on smaller scale immediately next to Port Washington.

Table 19: Comparison of Selected Characteristics in Port Washington and Peer Communities, 2010 and 2019

	Population (2020)	% Change Pop. from 2010	Median Household Income (2019)	% Change Income from 2010	% Bachelor's Degree (2019)	% Homeowner (2019)	Median Age (2019)
Port Washington	12,353	10.1%	\$ 68,167	0.6%	36.1%	65.0%	40.5
Cedarburg	12,121	6.9%	\$ 88,487	8.2%	57.8%	70.3%	44.4
Grafton	12,094	6.5%	\$ 75,963	-1.1%	42.7%	66.3%	42.2
Mequon	25,142	8.0%	\$ 116,486	-7.5%	67.3%	84.9%	47.6
West Bend	31,752	2.1%	\$ 60,910	0.4%	27.9%	66.4%	39.1
Hartford	15,626	10.0%	\$ 56,784	-12.9%	25.4%	66.7%	39.0
Saukville	4,258	-1.3%	\$ 52,329	-17.6%	28.9%	59.9%	32.3

Source: US Census American Community Survey, 2019 and 2020.

Conclusions

The data suggests Port Washington stands at a significant juncture in its history. Major growth over the past decade has created significant development opportunities, and its demographics show a mix of exurban growth and its more rural and blue-collar historic character. Its population is aging, and changing household characteristics are shifting the composition of the population. As in many places, housing and labor markets are tight, leading to increased costs for both, though Port Washington's location on the fringes of a large metropolitan area gives it more flexibility in these areas than in other places. The community's economy is dominated by a growing health care sector and a transforming manufacturing sector, with growth in tourism-related sectors and transportation and warehousing. This planning process is timely as Port Washington works out its converging identities as a small town, a bedroom community, a node of commerce toward the periphery of a metropolitan area, and a recreation destination on the shores of Lake Michigan. It positions the city to respond to many of the economic and growth-oriented opportunities before it while avoiding the pitfalls that have afflicted other communities.

APPENDIX 3
Port Washington Staff and Stakeholder
Survey Summary 12.31.21

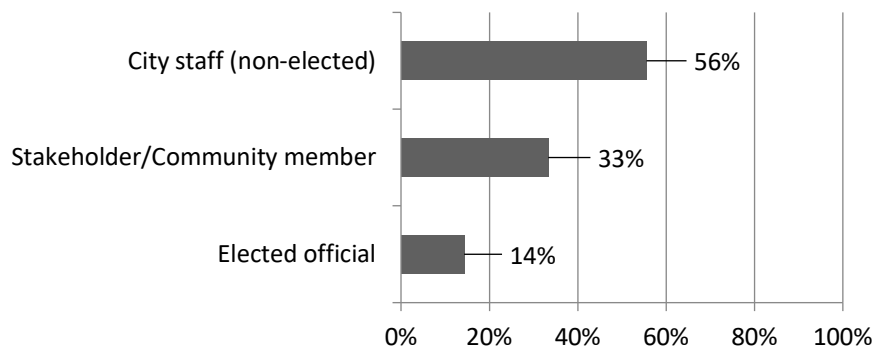
CITY OF PORT WASHINGTON | STAFF & STAKEHOLDER SURVEY SUMMARY

The City of Port Washington contracted with Northspan to conduct a survey for city staff, stakeholders, and strategy committee members as part of the strategic planning process. The survey was distributed via e-mail and was open from Monday, December 6, 2021, through Friday, December 17, 2021.

BACKGROUND

There were 63 total responses to the survey. Those who participated comprised of city staff, local elected officials, and other stakeholders and community members. Participants were able to select more than one category, if applicable.

What is your association with the City of Port Washington?



COMMUNITY PERCEPTIONS

Questions #2 through #6 on the survey mirrored questions asked of community members by ETC Institute during the residential community survey conducted during 2021 and asked participants to rank statements related to their satisfaction with the City of Port Washington, quality of city services and staff, and priorities they hope to see City leadership take on in the next 2-5 years.

Using a ranking scale of 1 (very dissatisfied) through 5 (very satisfied), how would you rate the City of Port Washington...					
	1 (very dissatisfied)	2	3	4	5 (very satisfied)
As a place to live	0%	0%	12%	47%	41%
As a place to raise children	0%	0%	14%	43%	43%
As a place to work	0%	7%	24%	31%	38%
As a place to retire	0%	9%	19%	33%	40%
As a place to visit	0%	0%	29%	31%	40%
As a place that is accepting of diversity	3%	17%	24%	32%	24%
As a place you are proud to call home	0%	2%	18%	35%	46%
As a community that is moving in the right direction	3%	3%	31%	36%	27%

For each item listed below, please rate your satisfaction on a scale of 1 (very dissatisfied) through 5 (very satisfied)

	1 (very dissatisfied)	2	3	4	5 (very satisfied)
Overall quality of public safety (police, fire, EMS)	0%	2%	10%	39%	49%
Overall maintenance of City streets, sidewalks, and infrastructure	3%	0%	27%	44%	25%
Overall flow of traffic and congestion management in the City	0%	3%	19%	51%	27%
Overall quality of parks and recreation programs and facilities	0%	0%	12%	51%	37%
Overall quality of City library	0%	0%	21%	40%	40%
Overall enforcement of City codes and ordinances	5%	7%	19%	41%	28%
Overall quality of solid waste services (trash, recycling, yard waste, etc)	0%	0%	24%	45%	31%
Overall quality of city communication with the public	2%	12%	29%	41%	17%
Overall quality of customer service from City employees	2%	2%	15%	42%	39%

Respondents were asked to select which **three** categories of city services listed should receive the most emphasis from City leaders in the next 2-5 years. Top ranked choices show support for core City services such as maintaining infrastructure and emergency services. Additionally, 40% of respondents selected City communication with the public as a top priority for the future.

1. Overall maintenance of City streets, sidewalks, and infrastructure

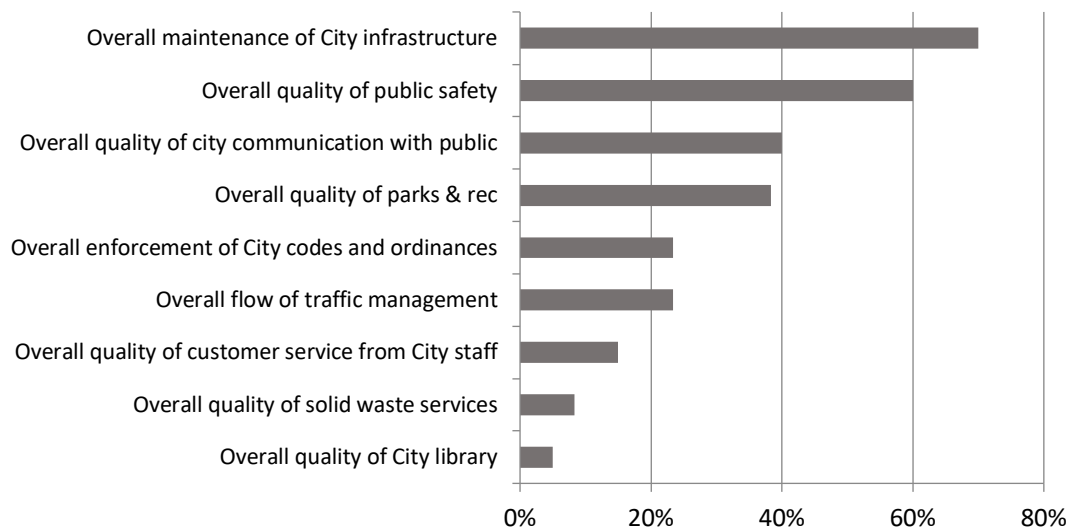


2. Overall quality of public safety (police, fire, EMS)



3. Overall quality of city communication with the public

Which three of the categories of city services listed below should receive the most emphasis from City leaders in the next 2-5 years? Select up to 3



Please rank the following community priority topics using a scale of 1 (very dissatisfied) to 5 (very satisfied)

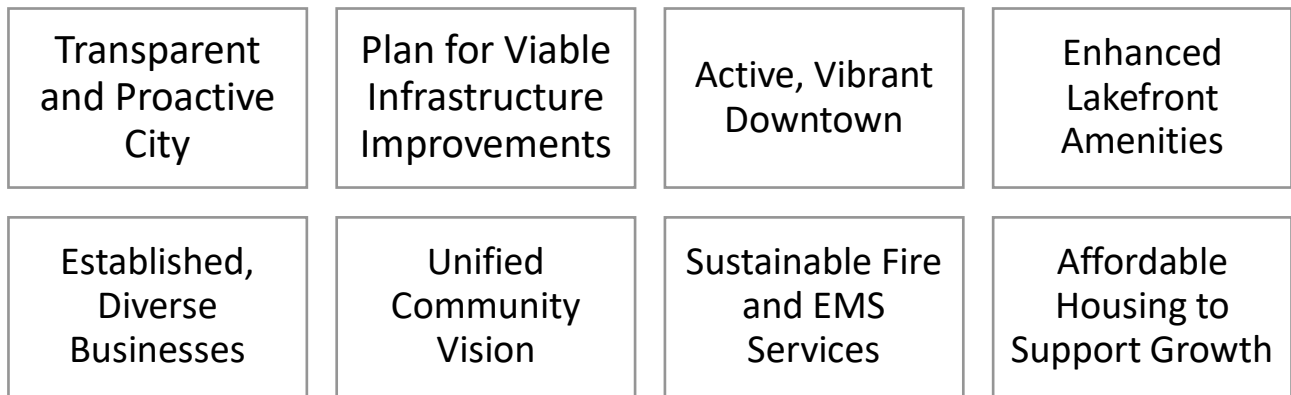
	1 - very dissatisfied	2	3	4	5 - very satisfied
Overall quality of services provided by the City	0%	0%	7%	61%	32%
Flood prevention and stormwater management	4%	4%	28%	42%	23%
Quality and drivability of City streets	3%	3%	31%	49%	14%
Availability and integration of biking lanes and trails	2%	7%	29%	45%	17%
Crime prevention	0%	2%	7%	46%	46%
A balanced City budget	2%	0%	23%	48%	27%
Vibrant business districts	2%	8%	34%	39%	17%
Variety of restaurants in the business districts	2%	14%	24%	41%	20%
Variety of retail in the business districts	2%	14%	33%	36%	16%
Availability of parking in the business districts near amenities	5%	15%	31%	37%	12%
Diversity of housing choices	3%	12%	29%	37%	19%
Environmental awareness	0%	10%	29%	46%	15%
Arts and cultural amenities	3%	26%	34%	26%	10%
Green space	0%	2%	17%	46%	36%
Historic preservation	2%	2%	25%	43%	29%
Overall quality of life	0%	0%	14%	51%	36%
Walkability of the business districts and other areas	0%	7%	8%	53%	32%
Welcoming and inclusive initiatives	2%	11%	26%	44%	18%

	1 - strongly disagree	2	3	4	5 - strongly agree
The City should prioritize sustainable practices in policy and decision making	0%	12%	32%	23%	33%
The City should devote resources to raise awareness and understanding of sustainability	7%	8%	34%	26%	25%

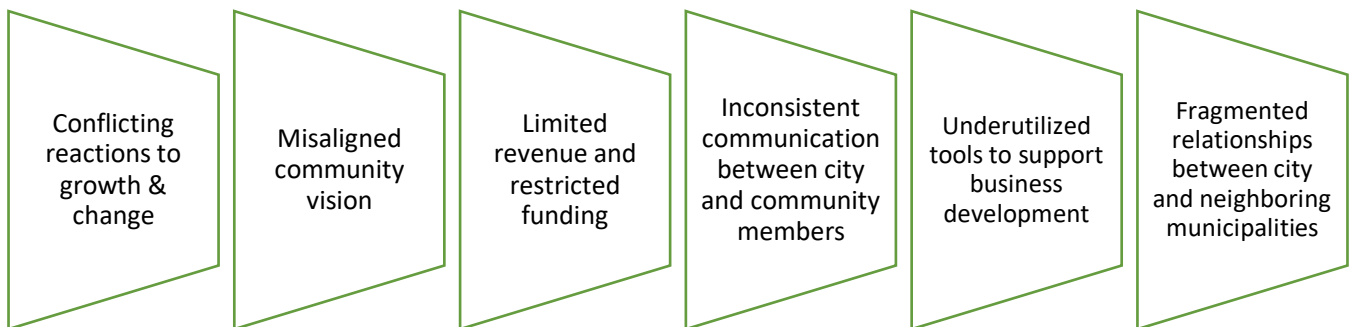
PRACTICAL VISION, UNDERLYING CONTRADICTIONS & STRATEGIC DIRECTIONS

The next section of the survey asked participants to consider the question: *“What do you want to see in place in 5 years as a result of our strategic planning actions?”*

Responses covered a variety of topics ranging from a desire to see redevelopment downtown, to creating an environment where everyone feels safe. There were 139 **practical vision** ideas submitted, categorized into high-level buckets below.



After identifying their practical vision, survey participants were next asked to identify **underlying contradictions**, addressing the prompt *“What may be blocking or holding us back from moving toward your practical vision?”* Respondents identified 108 blocks around these themes:



Finally, respondents were asked to reflect on their answers to the previous two questions and asked to consider *“What innovative things (actions, programs, or efforts) can our community and staff do, create or take one to move your Practical Vision ideas into accomplishments?”* Participants shared 93 **strategic direction** ideas, which are organized by theme below.



SWOT (STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS) ANALYSIS

For the final section of the survey, participants were asked to complete a SWOT Analysis, identifying strengths, weaknesses, opportunities, and threats as related to the City of Port Washington.

<p>Strengths – <i>Internal factors that give Port Washington an advantage over others</i></p>	<p>Weaknesses – <i>Internal factors that place Port Washington at a disadvantage relative to others</i></p>
<ul style="list-style-type: none"> • Lakefront with harbor and marina • Available space for expansion • Natural beauty of the area • Proximity to Milwaukee, Sheboygan, Green Bay • Proximity to interstate • Quality of Fire & EMS • Walkable downtown • <i>Passionate, friendly citizens</i> • <i>Good schools</i> • <i>Parks and green space</i> • <i>Local history</i> • <i>Low taxes, affordable community</i> • <i>Small town feel</i> 	<ul style="list-style-type: none"> • Resistance to change, perceptions of being “old fashioned” • Lack of unity around a shared community vision • Relationship between City and school district • Aging population • City communication with residents • <i>Divisive political climate</i> • <i>City unwilling to collaborate with other communities</i> • <i>Smaller retail base</i> • <i>Uncoordinated community organizations</i>
<p>Opportunities - <i>External factors that Port Washington could capitalize on to our advantage</i></p>	<p>Threats – <i>External factors that could create challenges for our community</i></p>
<ul style="list-style-type: none"> • Develop partnerships with other communities • Explore grant funding sources • Location of City in relation to Milwaukee, Sheboygan • Promote tourism amenities – boating, fishing, shipwreck designation, Lake Michigan, location on route to Door County • <i>Continued attraction of new residents</i> • <i>Rail access, expanded public transportation</i> • <i>Demand for trade school education</i> • <i>Desire for safe communities</i> 	<ul style="list-style-type: none"> • Neighboring communities’ services and amenities • Big box stores and online retailers • State legislation • Economic downturns • Climate change • Covid • <i>Environmental factors – bluff erosion</i> • <i>Future I-43 construction</i> • <i>Supply chain constraints</i>

APPENDIX 4
**Port Washington Pre-Workshop
Interviews Summary**

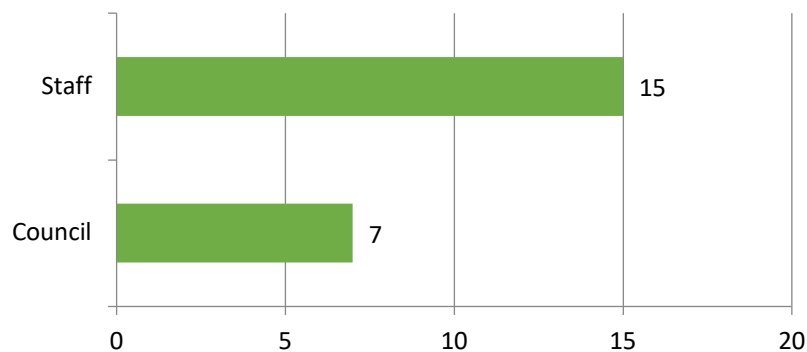
CITY OF PORT WASHINGTON | PRE-WORKSHOP INTERVIEWS SUMMARY

Prior to the strategic planning sessions, Northspan conducted interviews via Zoom with city staff and alderpersons to gain further knowledge and capture their hopes around change management & maturing the organization including:

- Strategic planning feasibility: team action planning & focused implementation
- succession planning,
- leadership coaching,
- internal training and professional development

During November and December 2021, twenty-two (22) interviews were completed. Those interviewed included mayor, alderpersons, city administrator, and city department heads.

Interview Participants City of Port Washington
November - December 2021



YOUR ROLE AND STRATEGIC PLANNING

Interviewees were asked to share about the role they play with the city and how they feel their skills and time are being used. Respondents have a variety of skills and backgrounds, from engineering and architecture to finance and public works.

What do you really enjoy doing?

- Working with other city staff
- Interacting with community, helping others
- Tackling a variety of tasks and challenges

What part of your work with the city can be a challenge?

- Ongoing pandemic
- Budgeting and fiscal challenges
- City organizational structure: *Are staff members in the correct roles to best use their skills?*
- City staff has limited capacity
- Concerns around infrastructure age and cost to replace or improve

What's going well?
<ul style="list-style-type: none"> • City Administrator - Tony • Growing city • General air of optimism for the future of Port Washington

What issues do you see?
<ul style="list-style-type: none"> • Overdeveloping the lakefront • Internal personality conflicts • Lack of diversity currently and how to best encourage and plan for positivity through demographic changes • Siloed city departments

What's the mood related to entering strategic planning? Excitement? Frustration?



Why might that be?

- Nervous to add too much to Tony and City staff's plates
- Enthusiasm around planning and being proactive
- Community reactions and perceptions – how to communicate to public throughout process?

What will enable strategic planning to move forward?

- Communication
- Buy-in
- Accountability
- Schedule & structure

What resources do you think you'll need?

- Solid leadership
- Professional development opportunities
- Project management skills

LEADERSHIP

What’s an example of an experience you had of being you effectively supervised?

- No micro-management
- Clear goals set and communicated
- Leading from the top – leader is willing to do what they ask others to do

Effective supervision...

- Empowers your team
- Gives staff ownership and pride in work
- Increases morale
- Promotes new ideas
- Encourages staff growth

What kind of help or support do you sense you will need over the coming months?

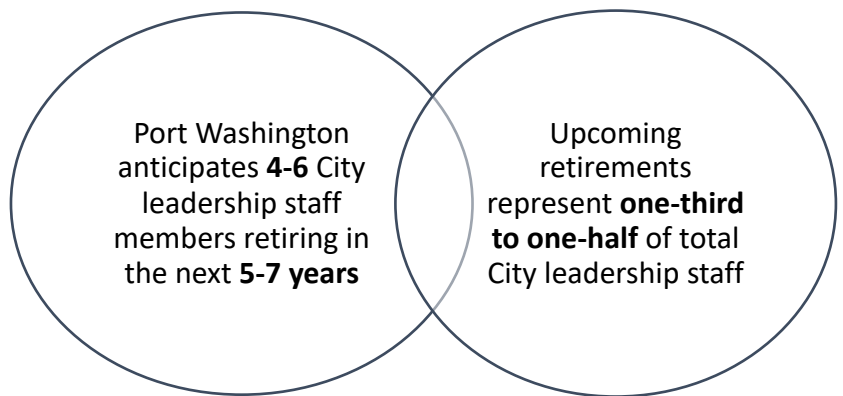
- Skilled workers
- Growing staff

SUCCESSION PLANNING & TRAINING

To fill these upcoming vacancies, 60% of interviewees (12 of 20) noted they expect to recruit externally (with a focus on regionally) to fill open positions.

Reasons for looking externally for candidates include getting new perspectives and discussions around the current culture does not focus on internal promotions.

There are a few internal candidates with potential, but interviewees noted staff will need growth, mentorship, and development opportunities to reach the next level.



<p>What’s going on outside the organization that could affect your ability to recruit the employees you need?</p>	<p>Where will the city be in three to five years, and what does that mean for the type of people you will need to recruit?</p>	<p>What type of training opportunities do you need to provide to ensure your current employees develop the skills you need?</p>
<ul style="list-style-type: none"> • Competitive wages/benefits packages in other communities • Transportation – auto dependent • Housing 	<ul style="list-style-type: none"> • Looking to hire at the director level • Someone who can hit the ground running • Seeking candidates that are open minded, good communicators and focused on bettering the community 	<ul style="list-style-type: none"> • How do we pass down knowledge from long tenured staff? • Professional development – creative – what skills/certs can benefit across departments? • Focusing on communication, engagement improvements with the community

APPENDIX 5
Port Washington Stakeholder Strategy
Idea Outcomes 01.03.22

What innovative actions can our community do to move our Practical Vision into accomplishments?

RATIONAL AIM

Enable the group to create clearly focused yet innovative and empowering strategy ideas that set

EXPERIENTIAL AIM

Generate excitement about collaboration within the group and new commitment to practical possibilities.

<p>IN THE ARENA OF: Public Space & Amenities</p> <p>WE HAVE LEARNED: We are underutilizing Port's incredible resources.</p> <p>AS ILLUSTRATED BY:</p>	<p>IN THE ARENA OF: Marketing & Public Relations</p> <p>WE HAVE LEARNED: There is value in clear, direct communication and unified messaging.</p> <p>AS ILLUSTRATED BY:</p>	<p>IN THE ARENA OF: Proactive Property Development</p> <p>WE HAVE LEARNED: Current property development is not consistent with community needs and manufacturing growth needs.</p> <p>AS ILLUSTRATED BY:</p>	<p>IN THE ARENA OF: Revenue Optimization</p> <p>WE HAVE LEARNED: There is a need and opportunity to steer revenue generation to priorities.</p> <p>AS ILLUSTRATED BY:</p>	<p>IN THE ARENA OF: Education Business Partnerships</p> <p>WE HAVE LEARNED: We have learned there is an access, awareness, and opportunity gap.</p> <p>AS ILLUSTRATED BY:</p>
<ul style="list-style-type: none"> • Upgrade coal dock park utilities • Update Upper Bluff Park utilities • Dog park • Settle Hwy 33 dispute with Saukville • Focus on navigation and connections between marina, schools, parks, housing, and schools • Sailing program • Expand festivals • Activity/place for youth • Sustainability (long term for public spaces, lakefront, and connections) • Expand access south beach • Increase marina access 	<ul style="list-style-type: none"> • Share clear community vision "branding" • Partner with service organizations • Portal/app about community events, parking & jobs • Direct video communication (mayor video) • Shared community calendar with Cedarburg, Grafton & Mequon • Community job port/app • Initiate change management training • Increase accessible downtown parking • Promote strength through social media 	<ul style="list-style-type: none"> • Affordable housing • Affordable workforce housing • Create construction development plan • Schools ready for higher enrollment- watch trends 	<ul style="list-style-type: none"> • Shared EMS • Strategic use of resources (new property tax) • Review of training programs (public safety) 	<ul style="list-style-type: none"> • Establish small business accelerator • Invest in the trades (MATC, high schools)



APPENDIX 6

**Port Washington Practical Vision,
Underlying Contradictions, and Strategic Directions
01.04 and 01.05.22**

Practical Vision Workshop 01.04.22

Underlying Contradictions & Strategic Directions Workshop 01.05.22



STRATEGIC DIRECTIONS | *What innovative, substantial actions will deal with the Underlying Contradictions and move us toward our Practical Vision?*

1. Pursuing Stakeholder Alignment Through Communications
2. Creating Accountability Through Policies & Procedures
3. Ranking Priorities to Identify Funding Sources
4. Catalyzing Development to Generate Revenue

PRACTICAL VISION | *What do we want to see in place in 5 years as a result of our strategic planning actions?*

- Priority-Driven Development
- Collaborative Private/Public Partnerships
- Purposeful & Engaging Public Spaces
- Safe & Accessible Downtown
- Critical Infrastructure Investments
- Comprehensive Civic Communication
- A Destination Workplace
- Reliable & Sustainable Emergency Services

UNDERLYING CONTRADICTIONS | *What is blocking us from moving toward our Practical Vision?*

- Unclear vision limits stakeholder engagement and focus
- Unwillingness to let go of past perceptions prevents bold change
- Financial constraints challenge stakeholder approaches
- Misinformation prevents understanding and promotes distrust
- Land constraints limit the ability to grow and require tough choices
- Conflicting priorities stifle execution
- Underdeveloped city procedures create apathy and lower expectations, reducing progress and limiting results

Practical Vision Workshop 01.04.22

Priority-Driven Development	Collaborative Private/Public Partnerships	Purposeful & Engaging Public Spaces	Safe & Accessible Downtown
<ul style="list-style-type: none"> • New zoning code • Development vision/standards • Subdivision architecture variety • Hwy. 32 development • Idealization of downtown density • Subdivision planning with purpose • Intentional development design standards • Re-purpose industrial buildings • More downtown retail • Manage environmental impact from development • Industrial development • Detailed housing study/plan • Pursue affordable housing 	<ul style="list-style-type: none"> • Shared downtown parking • Relationship-building with external entities (cities, county, schools, non-profits) • True partnership with community organizations • Education and business partnerships • Partnerships for development and growth • Attract job creating businesses • #1 destination for tourism regionally • Create private/public partnerships to effectively direct resources 	<ul style="list-style-type: none"> • All purpose community/convention center • Better utilization of Coal Dock Park • Expand Lakefront Park utility and access • Breakwall • Increased accessibility to South Beach • Unique lakefront attractions • Downtown amenities plan • Access bluff/marina 	<ul style="list-style-type: none"> • Downtown safety (multimodal transportation) • Accessibility to everything • Traffic flow and parking • Improved accessible parking downtown • Golf carts downtown • Increase broadband capacity

Practical Vision Workshop 01.04.22

Critical Infrastructure Investments	Comprehensive Civic Communication	A Destination Workplace	Reliable & Sustainable Emergency Services
<ul style="list-style-type: none"> • Limit borrowing to major capital expenses • Comprehensive asset management plan • Overall infrastructure plan • One city center • Unified municipal complex 	<ul style="list-style-type: none"> • Unified marketing! • Clear communication with staff and community • Frequent and direct communication • Strategic marketing initiative 	<ul style="list-style-type: none"> • Engaged employees • Competitive public service compensation • Culture of high standards and accountability • Strategic staff development & succession planning 	<ul style="list-style-type: none"> • EMS 6 minute response • 2nd fire station • Improve delivery of emergency services

Underlying Contradictions Workshop 01.05.22

Unclear vision limits stakeholder engagement and focus	Unwillingness to let go of past perceptions prevents bold change	Financial constraints challenge stakeholder approaches	Misinformation prevents understanding and promotes distrust
<ul style="list-style-type: none"> • Misaligned vision with overall stakeholders • Incomplete infrastructure plan • Undefined goals to finalize business plans (SMART) • Disjointed consensus on a unified vision • Unrealistic expectations (nothing is free) • Purposeful and engaging is undefined • Uncoordinated process • Unclear future • Limited focus on diversity • Unclear plan to sustain services • Inconsistent vision of future 	<ul style="list-style-type: none"> • Outdated perceptions of constructive relationships • Limited capacity • Collaboration, internally and externally • Resistance to change • Conflict of traditional and progressive ideals • Misaligned perceptions to reality • Unwillingness to be bold • Limited time to address large projects • Limited time for employees and volunteers for extra projects 	<ul style="list-style-type: none"> • Limited funds for more employees and capital equipment • Limited funding operations and capital • Limited staffing capacity • Limited financial resources • Unsupportive state government • Impractical mandates/statutes from WI legislature • Mismatch between investors and market 	<ul style="list-style-type: none"> • Uncoordinated communication • Underdeveloped marketing plan • Uninformed residents • Inadequate proactive communication • Unrealistic public engagement with civic content • Unclear communication • Disengaged public

Underlying Contradictions Workshop 01.05.22

Land constraints limit the ability to grow and require tough choices

- Underutilized land purpose
- Limited resources for fire house and marina parking
- Restricted topography/geography
- Polka/beer hall
- Limited discos

Conflicting priorities stifle execution

- Conflicting visions for partnerships
- Conflicting time goals vs priority
- Conflicting priorities on large issues stunt decision-making
- Alignment of priorities

Underdeveloped city procedures create apathy and lower expectations, reducing progress and limiting results

- Distrust of government
- Loss of focus from employees and citizens because of other priorities
- Disjointed priorities

Strategic Directions Workshop 01.05.22

Pursuing Stakeholder Alignment Through Communication	Creating Accountability Through Policies & Procedures	Ranking Priorities to Identify Funding Sources	Catalyzing Development to Generate Revenue
<ul style="list-style-type: none"> Legislative platform - create priorities Create relationships and synergy with other cities/orgs New city website Create a public dashboard Direct mayor communication - OZ Press and social media Provide immediate, relevant, accurate information on projects & initiatives Meet regularly with historic conflicting parties Create and implement communications plan Foster positive relationships through communication Pursue diverse activity plan Quarterly communications on accomplishments Create unified communication platform Director of communications Own the information Develop internal/external messaging on multiple communication platforms Share strategic plan with key stakeholders Develop a unified marketing plan with local businesses Market Port Washington to attract diverse talent & residents 	<ul style="list-style-type: none"> City departments review process and ID changes Processes to ensure relationships Avoid drastic change Expand staffing - study and clarify roles (strategic planning) Complete revision of general employee handbook Setting expectations and accountability for all aspects of a project Charters/contracts with groups that interact with city Annual training & development plan for employees Develop SOPs and commit to ongoing training across all departments Uniform SOP for each department approved by 12/31/22 Create process improvement 	<ul style="list-style-type: none"> Market tax levy referendum Develop 5-10 year road map Build one city complex Create financial plan to prioritize spending Study cost efficiencies of each city department Leverage business/government revenue opportunities Ranking priorities based on impact and feasibility Raise taxes Future referendum to fund future priorities 	<ul style="list-style-type: none"> Repurpose underperforming properties through TIF and downtown plan/vision Update a downtown parking plan and execute 1-2 agreed upon actions Develop common agreed-upon goal with culture of support Envision development outside marina district Future development must generate revenue outpacing growing expenses Effectively utilize land use plan Revise zoning codes and future land use plan

APPENDIX 7

Port Washington Vision Mission Core Values MiniSurvey Summary 1.17.22

CITY OF PORT WASHINGTON | VISION, MISSION & CORE VALUES MINI-SURVEY SUMMARY

After completing the first three strategic planning workshops, Strategy Committee members were asked to take a mini-survey to lay the groundwork for the development of a vision, mission and core values to guide the City. The survey was open from January 10-14, 2022 and sent via e-mail to all members of the strategy committee. There were 22 total responses, a summary of those responses is below.

VISION, MISSION, CORE VALUES

The survey began by asking members to describe their aspirations or dreams for the city, and how things would be different if those dreams or aspirations were to come to fruition.

What are your aspirations or dreams for the City?

- To be a *destination* ← top phrase used
- Vibrant, attractive small city
- Plentiful amenities – green space, adequate parking, affordable housing
- Leveraging location as county seat to lead in delivering best services to taxpayers
- Support for workforce, young families
- Being a place that provides opportunities to live, raise families, and operate businesses

How would things be different if your aspirations & dreams came true?

- Attracting people to visit or join the community
- Healthier financially
- More proactive, more energy
- Bustling downtown – maybe we'll run out of parking
- Pride in City – enthusiasm for community events and amenities

Participants were asked to **identify three words that you feel, or hope, embody the City of Port Washington**. There were 63 words total listed.

The top three words receiving **multiple mentions (3 each)** were:

Historic

Friendly

Progressive

Other words that received **two** nominations each are listed below:



STRENGTHS, WEAKNESSES, BENEFITS AND DANGERS

The final portion of the mini-survey directed members to identify **Strengths, Weaknesses, Benefits and Dangers** that exist or could potentially arise as the group works toward achieving their strategic directions.

<p>Strengths: <i>What are the strengths this group has toward creating the Practical Vision? What are our strengths as a team?</i></p>	<p>Weaknesses: <i>What are the weaknesses this group has toward accomplishing the Strategic Directions? What are our weaknesses as a team?</i></p>
<ul style="list-style-type: none"> • Willing (to engage, to listen, to consider all ideas, to work together) • Forward thinking, future focused • Diverse experiences, diversity in thought • Creative • Concern, dedication, “earnest compulsion” to do what is right for the community 	<ul style="list-style-type: none"> • Different goals, priorities • Old views vs new views, resistance to changes • (Lack of) experience, leadership in executing long term plans • (Lack of) diversity in stakeholder, city staff groups – are we hearing every voice? • Limited funding • Staff time and capacity

Benefits: *What benefits will our success bring?*

Dangers: *What obstacles or dangers do we anticipate confronting when we are highly successful?*

- **Clear vision and goals for the City**
- Additional revenue
- Better communication between City and community members
- Efficiencies with time and resources
- Increased workforce
- Happier City staff, excitement about the future
- *“A better community for people to call home”*

- **Losing community buy-in if not communicating with citizens clearly and effectively**
- Rising cost of living, community becomes unaffordable
- Parking availability, traffic congestion
- Inflexibility
- Growing too quickly
- Increasing core City services needs to in line with growth
- Negative feedback and/or perceptions

APPENDIX 8
**Port Washington Current Reality,
Success Indicators & Actions 1.21.22**

Current Realities, Success Indicators & Actions/Accomplishments

Current Reality: Description of the current situation as it relates to the Strategic Direction.

Success Indicators: Explains what will be different in 5 years if the organization mobilizes around and gets behind the Strategic Direction.

Actions/Accomplishments: Considers and answers “What do we need to accomplish at a level of program, project, or event to begin moving from Current Reality to Success as described?”

SD1. Pursuing Stakeholder Alignment Through Communications

Current Realities

- No newsletter or central location for city communication
- Required public notices
- Not plain language – what’s a statute or ordinance?
- No communication director
- Unclear to start for my project or event
- Everything in one language
- Website, email blasts, newspaper, social media
- Lack of role clarity
- Multiple websites and social media (police, fire)
- Not an obvious place to go in city hall
- Signage could be better

Success Indicators

- Increased and focused use of city’s digital platforms
- Increased customer satisfaction
- Increased staff engagement
- Increased public participation and engagement

Actions/Accomplishments

1. Hire with focused skillset for communications
2. Create standard policies and procedures for communications and implement change management training for staff
3. Assess and select analytics tool to create dashboard
4. Determine digital platform for city communications
5. Build baselines for success indicators
6. Assess and determine methodology and cadence for feedback
7. Use data to assess and plan annually, both internally and externally

SD2. Creating Accountability Through Policies & Procedures

Current Realities

- Lack of accountability and reporting structures
- Unclear to public what the process is; lack of clear policies and procedures; not sure where they are and if they exist
- Fire and police currently lead in policy/procedures
- Not using internal knowledge to train each other
- Changing requirements

- Overly reliant on institutional knowledge
- Enforcement isn't consistent
- Accountability is not a current priority

Success Indicators

- Higher level of employee performance
- Highly engaged employee base
- Reduction of legal costs
- Key performance indicators met

Actions/Accomplishments

1. Establish uniform employee evaluation process
2. Create policy process to assess and update city ordinances
3. Create professional development plans
4. Each department creates and approves its standard operating procedures
5. Develop and choose an engagement assessment (e.g., Q12)
6. Develop decision tree for accountability

SD3. Ranking Priorities to Identify Funding Sources

Current Realities

- Did a survey that provided input provided some feedback on priorities – safety, communication, infrastructure
- Capital expenditure planning is needed – expectation
- Revenue restrictions lead to squeezed budgets
- Needs exceed revenues – long-term imbalance
- Outgrowing services
- No cost to service model
- Know what funding sources are
- Many residents resistant to increased taxes
- No lean approach for city
- No defined revenue strategy
- Lack of intentional relationships
- Citizens cannot navigate budget

Success Indicators

- Budgeting dashboard and philosophy in place and understood across departments
- Long-term and proactive capital, maintenance, and asset plan in place
- Cost of service model in place
- Residents are supportive of expenditures, leading to a high net promoter score (NPS) of people recommending the city

Actions/Accomplishments

1. Develop budgeting philosophy for each department
2. Identify KPIs for dashboard and publish it
3. Develop partnerships with philanthropic partners to collaborate on priorities
4. Implement human capital development standards for all staff and elected officials

5. Develop cost of service model
6. Increase cash spending on capital projects by 25% over 5 years

SD4. Catalyzing Development to Generate Revenue

Current Realities

- Opportunity and eagerness to develop
- Experiencing a lot of growth and development
- Lots of cookie-cutter development (though not all is)
- Out of date, outmoded zoning code
- Clear vision in writing and understanding of vision in the community
- Heavy focus on marina; other sites need work (e.g., Simplicity site)
- Inconsistent practices
- Lack of community buy-in
- Comprehensive plan, downtown plan, etc. all in process
- City's goal beyond tax base is unclear
- TIF developments exist, though they come with deferred revenue and the city has immediate needs
- Not much infrastructure in place to manage developments well; more capacity to communicate with developers would help
- No predictable process for developers
- Projects around town are disjointed and piecemeal; could use more connectivity

Success Indicators

- More diversity of, location for, and attractiveness of development
- Developers and citizens express satisfaction with development process and timeline
- Deliberative TIF process used proactively for appropriate projects
- Population, number of businesses, and property values (value per acre) all grow
- Less need to borrow
- Redeveloped commercial corridors

Actions/Accomplishments

1. Finish downtown plan
2. Define city intent/goals for new development
3. Refine process for development review
4. Expand opportunities for public-private partnerships for affordable housing
5. Identify underperforming properties and market to developers
6. Develop design standards for development and architectural review process
7. Develop new zoning code
8. Utilize Community Development Authority to meet regularly and redevelop underperforming properties
9. Monitor and pursue opportunities for state/federal funding and promote them

APPENDIX 9
Port Washington Strategic Plan Timeline
1.21.22

2022				2023				2024				2025				2026
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1

SD1: Pursuing Stakeholder Alignment Through Communications

A1. Hire with focused skillset for communications	Start		End													
Create standard policies and procedures for communications and implement change management training for staff				Start			End									
A3. Assess and select analytics tool to create dashboard				Start		End										
A4. Determine digital platform for city communications				Start		End										
A5. Build baselines for success indicators							Start		End							
A6. Assess and determine methodology and cadence for feedback							Start		End							
A7. Use data to assess and plan annually, both internally and externally											S&E				S&E	

SD2: Creating Accountability Through Policies & Procedures

A1. Establish uniform employee evaluation process	Start		End													
A2. Create policy process to assess and update city ordinances	Start		S&E			S&E			S&E			S&E			S&E	S&E
A3. Create professional development plans		S&E			S&E				S&E			S&E			S&E	S&E
A4. Each department creates and approves its standard operating procedures		S&E							S&E							
A5. Develop and choose an engagement assessment (e.g., Q12)			Start		End											
A6. Develop decision tree for accountability			S&E													

SD3: Ranking Priorities to Identify Funding Sources

A1. Develop budgeting philosophy for each department	Start		End													
A2. Identify KPIs for dashboard and publish it			Start			End										
A3. Develop partnerships with philanthropic partners to collaborate on priorities				Start				End								
A4. Implement human capital development standards for all staff and elected officials						Start				End						
A5. Develop cost of service model							Start						End			
A6. Increase cash spending on capital projects by 25% over 5 years										Start					End	

SD4: Catalyzing Development to Generate Revenue

A1. Finish downtown plan	Start		End													
A2. Define city intent/goals for new development	Start		End					S&E				S&E				S&E
A3. Refine process for development review	Start		End													
A4. Expand opportunities for public-private partnerships for affordable housing			Start					End								
A5. Identify underperforming properties and market to developers			Start		End											
A6. Develop design standards for development and architectural review process				Start			End									
A7. Develop new zoning code				Start					End							
Utilize Community Development Authority to meet regularly and redevelop underperforming properties							Start				End					
A9. Monitor and pursue opportunities for state/federal funding and promote them				S&E			S&E				S&E				S&E	S&E