

Planning

Agency Budget by Fund

Fund	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
General	3,332,833	3,477,424	3,390,893	3,562,032	3,766,262	3,766,262
Other Grants	1,458,739	1,138,941	1,558,377	1,402,742	1,436,411	1,436,411
Total	4,791,572	4,616,365	4,949,270	4,964,774	5,202,674	5,202,674

Agency Budget by Service

Service	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Comp Planning And Dev Review	1,933,018	1,918,273	2,061,926	1,972,866	2,240,850	2,240,850
Metropolitan Planning Org	1,569,157	1,281,245	1,400,133	1,585,630	1,626,019	1,626,019
Neigh Planning Pres And Design	1,289,397	1,416,847	1,487,210	1,406,278	1,335,805	1,335,805
Total	4,791,572	4,616,365	4,949,270	4,964,774	5,202,674	5,202,674

Agency Budget by Major-Revenue

Major Revenue	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Intergov Revenues	-	(23,323)	-	(36,748)	(36,748)	(36,748)
Charges For Services	(24,209)	(5,457)	(37,261)	-	-	-
Invest Other Contrib	(7,517)	(1,500)	(28,629)	(1,500)	(1,500)	(1,500)
Transfer In	(3,000)	-	-	-	-	-
Total	(34,726)	(30,280)	(65,890)	(38,248)	(38,248)	(38,248)

Agency Budget by Major-Expense

Major Expense	2021 Actual	2022 Adopted	2022 Actual	2023 Adopted	2024 C2C	2024 Request
Salaries	2,775,223	2,960,933	2,958,154	3,078,755	3,209,052	3,302,533
Benefits	881,349	863,059	913,367	897,717	883,085	883,085
Supplies	86,965	75,350	68,223	77,130	77,130	77,130
Purchased Services	608,334	517,076	737,172	672,201	771,788	678,307
Debt Othr Financing	249,494	-	106,768	-	-	-
Inter Depart Charges	90,278	90,495	89,695	89,140	93,607	93,607
Inter Depart Billing	(41,500)	(41,500)	(41,500)	(41,500)	(41,500)	(41,500)
Transfer Out	176,155	181,232	183,280	229,580	247,759	247,759
Total	4,826,298	4,646,645	5,015,160	5,003,022	5,240,922	5,240,922



Department of Planning & Community & Economic Development

Planning Division

Heather Stouder, Director

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To: Mayor Satya Rhodes-Conway
From: Heather Stouder, Planning Division Director
Date: July 21, 2023
Subject: 2024 Operating Budget Transmittal Memo
CC: Christie Baumel; Dave Schmiedicke; Christine Koh; Maggie McClain; Matt Wachter; Emily Clavette; Bill Fruhling

Goals of Agency's Operating Budget

The Planning Division currently includes three services: Comprehensive Planning & Development Review, Neighborhood Planning, Preservation, & Design, and the Metropolitan Planning Organization. The Comprehensive Plan "Elements" most impacted by Planning Division work include "Land Use & Transportation", "Neighborhoods & Housing", and "Culture & Character". Through the Results Madison process, we have revised our service structure and are in the midst of creating annual data indicators to help illustrate progress toward Planning Division and broader community goals over time. A description and major goals within each of the existing service areas are as follows:

Comprehensive Planning and Development Review - Plan for equitable and sustainable growth, efficient use of land, efficient and equitable transportation systems, and complete neighborhoods.

- Prepare, maintain, and monitor the progress of the City's Comprehensive Plan.
- Maintain, monitor, and recommend changes to the city's zoning, subdivision, and urban design ordinances. In 2024, we will continue to support ordinance updates, including continued work on those outlined in Housing Forward, and refinement and modernization of Urban Design District standards.
- Lead the review and evaluation of development proposals based on consistency with adopted plans and ordinances. In 2024, we expect to continue to support the current fast pace of housing and other development proposals submitted for review by staff and the Urban Design Commission, Plan Commission and Common Council. In the coming years, we aim to ensure that the development review process is clear and accessible to newer and small-scale developers, including those for which English is not a primary language.
- Maintain the city's geographic database and provide data, information, and mapping services to city agencies and community partners.
- Strengthen relationships with community partners across the region.
- In 2024, we will continue to provide staff support the City's Department of Transportation in efforts such as North-South Bus Rapid Transit, preparation for potential Amtrak service, and interchange studies, all of which have significant land use and mobility impacts for the City and region.

Neighborhood Planning, Preservation, and Design - Plan for complete neighborhoods and support City-initiated redevelopment in developed, mature parts of the City. Balance growth and change in Madison with integration of art and cultural/historic preservation. Support neighborhood inclusivity and leadership capacity, particularly within historically underrepresented groups.

- Prepare and maintain twelve subarea plans to provide a framework for city investment and land use regulation, as outlined in the Planning Framework adopted by the Common Council in 2022. In 2024, we will complete the first two new subarea plans (Northeast Area and West Area), and both the Southeast Area and Southwest Area Plan processes will be underway.
- Strengthen existing residential and commercial areas as Madison continues to grow and change. In 2024, we will continue to support strategic, City-initiated redevelopment along South Park Street, consistent with the South Madison Plan, as well as the development of the Brayton Lot, consistent with the Downtown Plan.
- Protect and enhance the City's natural, cultural, aesthetic, and historic resources.
- Administer the City's preservation planning program with a focus on implementing the Historic Preservation Plan.
- Administer the Madison Arts program with a focus on equitable distribution of resources. In 2024, we will distribute over \$100,000 in Art Grants to area artists.

Metropolitan Planning Organization - Facilitate coordinated and comprehensive regional transportation planning and decision-making that is fair and impartial.

- Prepare and maintain long-range multi-modal Regional Transportation Plan. In 2024, staff and consultants will begin work on the 5-year update to the Regional Transportation Plan
- Prepare a five-year transportation improvement program to provide transportation investments that meet metropolitan transportation needs.
- Provide transportation-related data and analytical support to area municipalities.
- Administer a regional transportation demand management (TDM) program called "Rideshare" to assist area municipalities, employers, and others with strategies to reduce the use of single-occupant vehicles.

99% Budget for General, Library, Fleet fund agencies

Over the past five years, the Planning Division has a track record of end the year very slightly under budget (an average of 2%). As an agency for which 85% of the budget request is *directly* for personnel, and only 2.4% is for consultant support, the most practical strategy for managing the 99% target (seeking savings of \$37,663) would be to delay filling a vacant position if a vacancy were to occur. Absent a vacancy, other methods in 2024 could include a reduction of financial support for hourly interns, reduction of support for employee trainings outside of the City's offerings, and more reductions to the already tight budgets for consultants and community partners to support public engagement in subarea planning processes.

The Planning Division continues to seek ways to support and collaborate with colleagues in other agencies to improve the efficiency of City systems relating to data maintenance and communication, public engagement, City initiated (re)development, and more.

Finally, as we in the Planning Division become more involved in the *implementation* of plan recommendations, we will explore appropriate opportunities to reflect staff time to capital projects. Time spent supporting these efforts can vary widely year-to-year, but should offer some cost savings to the Planning Division Operating Budget in 2024 and beyond.

Optional Supplemental Request

\$30,000 in additional funding for the Metropolitan Planning Organization (MPO) Service would leverage an additional \$120,000 in newly available federal funds to support initiatives beneficial to the City and region, including but not limited to the following:

- Significant support for consultant services related to the 5-Year Regional Transportation Plan Update to improve public engagement, improve clarity during the planning process, and help to ensure relevance for the Madison region's growing and changing population.

Similar to last year's request, this supplement to the MPO Service is requested with the new knowledge of the likely increase in available federal funds. Each additional dollar provided by local communities can leverage another \$4 in federal funding up to the estimated \$120,000 total increase. MPO staff continue to work diligently with other communities to encourage additional local match, and if secured, communities from other jurisdictions would reduce the \$30,000 requested from the City of Madison through this request.

Thank you for the opportunity to request a 2024 budget for the Planning Division similar to that of 2023. As a team, we will continue to work closely with other City agencies and community partners to maintain pace with the high level of investment and development activity citywide, looking forward responsibly to support a future-ready Madison.

Service Changes - Official Request

The table below summarizes the Agency request compared to cost-to-continue. Data is based on the line item budget entered in Munis Central Budget. The table is organized by Fund, Service, and Major Expenditure/ Revenue category.

Projection Number	(Multiple Items)
Segment 3	65 - PLANNING

Fund/Service/Major	Cost to Continue (C2C)	Request	Change: Request v. C2C
1100 - GENERAL	\$3,766,262	\$3,766,262	\$0
652 - COMP PLANNING AND DEV REVIEW	\$2,214,850	\$2,214,850	\$0
42 - INTERGOV REVENUES	\$0	\$0	\$0
43 - CHARGES FOR SERVICES	\$0	\$0	\$0
48 - OTHER FINANCE SOURCE	\$0	\$0	\$0
49 - TRANSFER IN	\$0	\$0	\$0
51 - SALARIES	\$1,633,107	\$1,633,107	\$0
52 - BENEFITS	\$456,623	\$456,623	\$0
53 - SUPPLIES	\$19,225	\$19,225	\$0
54 - PURCHASED SERVICES	\$63,050	\$63,050	\$0
57 - INTER DEPART CHARGES	\$42,845	\$42,845	\$0
59 - TRANSFER OUT	\$0	\$0	\$0
653 - METROPOLITAN PLANNING ORG	\$215,607	\$215,607	\$0
42 - INTERGOV REVENUES	-\$36,748	-\$36,748	\$0
43 - CHARGES FOR SERVICES	\$0	\$0	\$0
47 - MISC REVENUE	\$0	\$0	\$0
48 - OTHER FINANCE SOURCE	\$0	\$0	\$0
49 - TRANSFER IN	\$0	\$0	\$0
51 - SALARIES	\$0	\$0	\$0
52 - BENEFITS	\$126	\$126	\$0
53 - SUPPLIES	\$0	\$0	\$0
54 - PURCHASED SERVICES	\$435	\$435	\$0
57 - INTER DEPART CHARGES	\$4,035	\$4,035	\$0
59 - TRANSFER OUT	\$247,759	\$247,759	\$0

Fund/Service/Major	Cost to Continue (C2C)	Request	Change: Request v. C2C
651 - NEIGH PLANNING PRES AND DESIGN	\$1,335,805	\$1,335,805	\$0
42 - INTERGOV REVENUES	\$0	\$0	\$0
43 - CHARGES FOR SERVICES	\$0	\$0	\$0
46 - INVEST OTHER CONTRIB	-\$1,500	-\$1,500	\$0
47 - MISC REVENUE	\$0	\$0	\$0
48 - OTHER FINANCE SOURCE	\$0	\$0	\$0
49 - TRANSFER IN	\$0	\$0	\$0
51 - SALARIES	\$872,807	\$872,807	\$0
52 - BENEFITS	\$237,803	\$237,803	\$0
53 - SUPPLIES	\$22,025	\$22,025	\$0
54 - PURCHASED SERVICES	\$203,325	\$203,325	\$0
57 - INTER DEPART CHARGES	\$42,845	\$42,845	\$0
58 - INTER DEPART BILLING	-\$41,500	-\$41,500	\$0
59 - TRANSFER OUT	\$0	\$0	\$0

Fund/Service/Major	Cost to Continue (C2C)	Request	Change: Request v. C2C
1220 - OTHER GRANTS	\$0	\$0	\$0
652 - COMP PLANNING AND DEV REVIEW	\$0	\$0	\$0
42 - INTERGOV REVENUES	-\$26,000	-\$26,000	\$0
51 - SALARIES	\$0	\$0	\$0
52 - BENEFITS	\$0	\$0	\$0
54 - PURCHASED SERVICES	\$26,000	\$26,000	\$0
653 - METROPOLITAN PLANNING ORG	\$0	\$0	\$0
42 - INTERGOV REVENUES	-\$1,153,652	-\$1,153,652	\$0
43 - CHARGES FOR SERVICES	-\$9,000	-\$9,000	\$0
46 - INVEST OTHER CONTRIB	\$0	\$0	\$0
47 - MISC REVENUE	\$0	\$0	\$0
48 - OTHER FINANCE SOURCE	\$0	\$0	\$0
49 - TRANSFER IN	-\$247,759	-\$247,759	\$0
51 - SALARIES	\$703,138	\$796,619	\$93,482
52 - BENEFITS	\$188,533	\$188,533	\$0
53 - SUPPLIES	\$35,880	\$35,880	\$0
54 - PURCHASED SERVICES	\$478,978	\$385,497	-\$93,482
56 - DEBT OTHR FINANCING	\$0	\$0	\$0
57 - INTER DEPART CHARGES	\$3,882	\$3,882	\$0
59 - TRANSFER OUT	\$0	\$0	\$0
651 - NEIGH PLANNING PRES AND DESIGN	\$0	\$0	\$0
42 - INTERGOV REVENUES	\$0	\$0	\$0
51 - SALARIES	\$0	\$0	\$0
52 - BENEFITS	\$0	\$0	\$0
53 - SUPPLIES	\$0	\$0	\$0
54 - PURCHASED SERVICES	\$0	\$0	\$0

2024 Operating Budget Service Budget Proposal Form

Instructions: Complete one form per Service. When saving the file, add the Agency and Service name to the file name. Submit by saving a copy of the proposal form in you F:/Common Drive Folder.

Part 1. Identifying Information	
Select your Agency:	PLANNING
Enter your Service:	Comprehensive Planning and Development Review
Review the "Service Description" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to description <input type="checkbox"/> Yes – Description needs to be updated	
<i>If yes, enter updated Service Description here:</i>	
Click or tap here to enter text.	
Review the "Activities Performed by Service" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to activities <input type="checkbox"/> Yes – Activities need to be updated	
<i>If yes, enter updated Activities Performed by Service here:</i>	
Click or tap here to enter text.	

Part 2. Base Budget Proposal: Significant Changes (\$10,000 or more)
Agencies can propose net neutral reallocations within their budget, but must explain changes of \$10,000 or more at the Service and/or Major level .
Examples of changes that do need to be detailed:
<ul style="list-style-type: none"> • Moving \$10,000+ within a Service from one Major to another Major • Moving \$10,000+ within a Major from one Service to another Service
Examples of changes that do not need to be detailed:
<ul style="list-style-type: none"> • Total changes of less than \$10,000 at the Major and Service level. • Object level changes do not need additional justification if the net change to the Major is less than \$10,000. For example, if you propose moving \$15,000 from Consulting to Software within the Purchased Services Major, you do not need to detail the change if it is within the same Service.
If your proposed changes are a technical correction to your base budget, you can simply state that the change is a correction/ adjustment in the narrative questions below.

Summary Table of Service and/or Major Changes of \$10,000 or More

Complete the table below to detail changes at the Service and/or Major level and answer the narrative questions to describe your changes. **If you have no significant changes, skip this section**

Fund	Major	\$ Change	Description
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.

Explain the impact of your proposed change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 3. Supplemental Requests

Agencies may submit up to one (1) supplemental request to address citywide priorities or urgent needs. Before submitting a supplemental request, agencies should first examine whether they can address their needs through reallocations within the base budget or by implementing operational efficiencies. **If you are not submitting a supplemental request, skip this section.**

Describe your supplemental proposal. What citywide priority or urgent need does the proposal address? What data informed your proposal?

Click or tap here to enter text.

Estimated Costs:

- Personnel: \$Click or tap here to enter text.
- Non-Personnel: \$Click or tap here to enter text.
- Explain the assumptions you used to estimate costs: Click or tap here to enter text.

What efforts have you taken to reallocate resources, identify process improvements, or implement other operational efficiencies prior to submitting this request?

Click or tap here to enter text.

If funded, what performance measures will you track to determine whether the additional funding is meeting the stated goals?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 4. Personnel Changes

All proposed personnel change must be submitted for review, even if the change is net neutral. Agencies should contact their HR Analyst to discuss proposed changes prior to submitting their request. Any proposal that adds a completely new position (i.e. a position that does not have an existing classification) must include a draft job description.

If the proposed personnel changes require supplemental funding, be sure to complete "Part 3. Supplemental Request" above. **If you are not submitting personnel changes, skip this section.**

Allocation Changes: Does your proposal change the position allocations of existing positions?

- No – No allocation changes
 Yes – Includes proposed allocation changes

If yes, complete the "Position Allocation Change Form" and submit as part of your proposal.

Reclassifications: Does your proposal reclassify existing positions?

- No – No reclassifications
 Yes – Includes proposed reclassifications

If yes, provide the position number and briefly describe the change:

Total of approximately \$55,997 increase between Salary and Benefits for 6 positions
628 – Planner 1 (18-06) to Planner 2 for incumbent – approved/completed
3618 – Planner 1 (18-06) to GIS Specialist 2 (18-08) for incumbent – study in progress
626 - Planner 3 (18-10) to Planner 4 (18-12) for incumbent – study anticipated late 2023
629 – Planner 2 (18-08) to Planner 3 (18-10) for incumbent – study anticipated late 2023
4504 – Planner 2 (18-08) to Planner 3 (18-10) for incumbent – study anticipated late 2023
3189 – Planning GIS Specialist (18-09) to GIS Specialist (18-10) for incumbent – study anticipated 2024

*We request that these recalssifications be considered during the Finance Recommendation stage of the Operating Budget process.

of FTEs: Does your proposal change the total number of FTE positions for an existing classification?

- No – No change to # of FTEs
 Yes – Includes proposed change to # of FTEs

If yes, provide the position classification and briefly describe the change:

Click or tap here to enter text.

New Positions: Does your proposal create a new position? (i.e. position with no existing classification)

- No – No new positions
 Yes – Includes proposed new positions

If yes, submit a draft position description with your proposal and briefly describe the change here:

Click or tap here to enter text.

Explain the impact of your proposed personnel change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

We do not anticipate a change to current activities and service levels. All incumbents listed have been working out of class in their current positions within the Planning Division’s Development Review and Data & Mapping service areas. For all positions, this change is needed to reflect increases in responsibility in areas for which workloads have increased and continue to increase.

Explain how your proposed personnel change(s) will align with your draft Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals?

Each position listed has responsibilities that further one of the goals in the Planning Division’s Equity Action Plan, which is to “stop creating inaccessible materials and presentations”. One example is that those involved heavily in the Development Review service area will be working to ensure that the development review process is accessible to new customers, including those who do not speak English as a first language. Another example is that all positions listed have responsibilities related to clear and simple presentation of data, whether in the form of maps, images, verbal presentations, in writing, or a combination thereof.

Outside of our Division’s Equity Action Plan, employees in these positions continue to work on data analysis, policy and ordinance changes, many of which move forward with the goal of furthering racial equity in Madison.

2024 Operating Budget Service Budget Proposal Form

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Part 1. Identifying Information	
Select your Agency:	PLANNING
Enter your Service:	Metropolitan Planning Organization
Review the "Service Description" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to description <input type="checkbox"/> Yes – Description needs to be updated	
<i>If yes, enter updated Service Description here:</i>	
Click or tap here to enter text.	
Review the "Activities Performed by Service" in the 2023 Adopted Budget . Do you have any updates?	
<input checked="" type="checkbox"/> No – No change to activities <input type="checkbox"/> Yes – Activities need to be updated	
<i>If yes, enter updated Activities Performed by Service here:</i>	
Click or tap here to enter text.	

Part 2. Base Budget Proposal: Significant Changes (\$10,000 or more)
Agencies can propose net neutral reallocations within their budget, but must explain changes of \$10,000 or more at the Service and/or Major level .
Examples of changes that do need to be detailed:
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<ul style="list-style-type: none"> • Total changes of less than \$10,000 at the Major and Service level. • Object level changes do not need additional justification if the net change to the Major is less than \$10,000. For example, if you propose moving \$15,000 from Consulting to Software within the Purchased Services Major, you do not need to detail the change if it is within the same Service.
If your proposed changes are a technical correction to your base budget, you can simply state that the change is a correction/ adjustment in the narrative questions below.

Summary Table of Service and/or Major Changes of \$10,000 or More

Complete the table below to detail changes at the Service and/or Major level and answer the narrative questions to describe your changes. **If you have no significant changes, skip this section**

Fund	Major	\$ Change	Description
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
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Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.

Explain the impact of your proposed change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 3. Supplemental Requests

Agencies may submit up to one (1) supplemental request to address citywide priorities or urgent needs. Before submitting a supplemental request, agencies should first examine whether they can address their needs through reallocations within the base budget or by implementing operational efficiencies. **If you are not submitting a supplemental request, skip this section.**

Describe your supplemental proposal. What citywide priority or urgent need does the proposal address? What data informed your proposal?

We request a \$30,000 increase in the City of Madison contribution to the Metropolitan Planning Organization as a 20% local match to leverage an anticipated \$120,000 in additional federal funding. This increase will support multiple activities within the MPO's 2024 Unified Planning Work Program, the most significant item being consultant services for the 5-year update to the Regional Transportation Plan.

Estimated Costs:

- Personnel: [Click or tap here to enter text.](#)
- Non-Personnel: \$30,000
- Explain the assumptions you used to estimate costs: [Click or tap here to enter text.](#)

What efforts have you taken to reallocate resources, identify process improvements, or implement other operational efficiencies prior to submitting this request?

This request unlocks the ability to utilize additional federal funding. The new Greater Madison MPO Manager continues to seek increased contributions from other communities within the MPO boundaries, which could offset a portion of the \$30,000 requested.

If funded, what performance measures will you track to determine whether the additional funding is meeting the stated goals?

[Click or tap here to enter text.](#)

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

As mentioned in other Service Proposals, one of the goals in the Planning Division Equity Action Plan is to “stop creating inaccessible materials and presentations”. A critical element of the 5-year Regional Transportation Plan Update will focus on refining/reimagining outreach and communication materials to ensure that they are relevant to the diverse communities across the Greater Madison MPO region.

Part 4. Personnel Changes

All proposed personnel change must be submitted for review, even if the change is net neutral. Agencies should contact their HR Analyst to discuss proposed changes prior to submitting their request. Any proposal that adds a completely new position (i.e. a position that does not have an existing classification) must include a draft job description.

If the proposed personnel changes require supplemental funding, be sure to complete “Part 3. Supplemental Request” above. **If you are not submitting personnel changes, skip this section.**

Allocation Changes: Does your proposal change the position allocations of existing positions?

- No – No allocation changes
- Yes – Includes proposed allocation changes

If yes, complete the “Position Allocation Change Form” and submit as part of your proposal.

Reclassifications: Does your proposal reclassify existing positions?

- No – No reclassifications
- Yes – Includes proposed reclassifications

If yes, provide the position number and briefly describe the change:

Planner 2 (18-08) to Planner 3 (18-10) to accurately reflect the work of an incumbent (neutral for the General Fund – supported by Federal Grant).

*We request that this reclassification be considered during the Finance Recommendation stage of the Operating Budget process

of FTEs: Does your proposal change the total number of FTE positions for an existing classification?

No – No change to # of FTEs

Yes – Includes proposed change to # of FTEs

If yes, provide the position classification and briefly describe the change:

Click or tap here to enter text.

New Positions: Does your proposal create a new position? (i.e. position with no existing classification)

No – No new positions

Yes – Includes proposed new positions

If yes, submit a draft position description with your proposal and briefly describe the change here:

Click or tap here to enter text.

Explain the impact of your proposed personnel change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed personnel change(s) will align with your draft Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals?

Click or tap here to enter text.

2024 Operating Budget Service Budget Proposal Form

Instructions: Complete one form per Service. When saving the file, add the Agency and Service name to the file name. Submit by saving a copy of the proposal form in you F:/Common Drive Folder.

Part 1. Identifying Information	
Select your Agency:	PLANNING
Enter your Service:	Neighborhood Planning, Preservation, and Design
Review the "Service Description" in the 2023 Adopted Budget . Do you have any updates? <input type="checkbox"/> No – No change to description <input checked="" type="checkbox"/> Yes – Description needs to be updated	
<i>If yes, enter updated Service Description here:</i> This service maintains and strengthens existing residential and commercial neighborhoods focusing on the downtown, isthmus, and central city, as well as protecting and enhancing the City's natural, cultural, aesthetic, and historic resources. This service provides neighborhood planning services and technical services to neighborhoods, carries out the City's preservation planning program, administers the Madison Arts program, develops and maintains urban design guidelines, prepares development concept plans, and monitors and recommends changes to the City's land development regulations. The goals of this service is to plan for efficient and equitable land use and complete neighborhoods in developed, mature parts of the City, balancing growth and change in Madison with integration of art and cultural/historic preservation, and to support neighborhood inclusivity and leadership capacity, particularly within historically underrepresented groups.	
Review the "Activities Performed by Service" in the 2023 Adopted Budget . Do you have any updates? <input checked="" type="checkbox"/> No – No change to activities <input type="checkbox"/> Yes – Activities need to be updated	
<i>If yes, enter updated Activities Performed by Service here:</i> Click or tap here to enter text.	

Part 2. Base Budget Proposal: Significant Changes (\$10,000 or more)
Agencies can propose net neutral reallocations within their budget, but must explain changes of \$10,000 or more at the Service and/or Major level . Examples of changes that do need to be detailed: <ul style="list-style-type: none"> Moving \$10,000+ within a Service from one Major to another Major Moving \$10,000+ within a Major from one Service to another Service Examples of changes that do not need to be detailed: <ul style="list-style-type: none"> Total changes of less than \$10,000 at the Major and Service level.

- Object level changes do not need additional justification if the net change to the Major is less than \$10,000. For example, if you propose moving \$15,000 from Consulting to Software within the Purchased Services Major, you do not need to detail the change if it is within the same Service.

If your proposed changes are a technical correction to your base budget, you can simply state that the change is a correction/ adjustment in the narrative questions below.

Summary Table of Service and/or Major Changes of \$10,000 or More

Complete the table below to detail changes at the Service and/or Major level and answer the narrative questions to describe your changes. **If you have no significant changes, skip this section**

Fund	Major	\$ Change	Description
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.
Select	Select	Enter \$.	Click or tap here to enter text.

Explain the impact of your proposed change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 3. Supplemental Requests

Agencies may submit up to one (1) supplemental request to address citywide priorities or urgent needs. Before submitting a supplemental request, agencies should first examine whether they can address their needs through reallocations within the base budget or by implementing operational efficiencies. **If you are not submitting a supplemental request, skip this section.**

Describe your supplemental proposal. What citywide priority or urgent need does the proposal address? What data informed your proposal?

Click or tap here to enter text.

Estimated Costs:

- Personnel: \$Click or tap here to enter text.
- Non-Personnel: \$Click or tap here to enter text.
- Explain the assumptions you used to estimate costs: Click or tap here to enter text.

What efforts have you taken to reallocate resources, identify process improvements, or implement other operational efficiencies prior to submitting this request?

Click or tap here to enter text.

If funded, what performance measures will you track to determine whether the additional funding is meeting the stated goals?

Click or tap here to enter text.

Explain how your proposed change(s) will align with your draft 2023-2024 Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals? Is the change related to a Neighborhood Resource Team (NRT) recommendation? Be as specific as possible.

Click or tap here to enter text.

Part 4. Personnel Changes

All proposed personnel change must be submitted for review, even if the change is net neutral. Agencies should contact their HR Analyst to discuss proposed changes prior to submitting their request. Any proposal that adds a completely new position (i.e. a position that does not have an existing classification) must include a draft job description.

If the proposed personnel changes require supplemental funding, be sure to complete "Part 3. Supplemental Request" above. **If you are not submitting personnel changes, skip this section.**

Allocation Changes: Does your proposal change the position allocations of existing positions?

- No – No allocation changes
 Yes – Includes proposed allocation changes

If yes, complete the "Position Allocation Change Form" and submit as part of your proposal.

Reclassifications: Does your proposal reclassify existing positions?

- No – No reclassifications
 Yes – Includes proposed reclassifications

If yes, provide the position number and briefly describe the change:
\$10,459 increase between Salary and Benefits

4573 – Planner 2 (18-08) to Planner 3 (18-10) for incumbent (Approved by CC June 2023)

*We request that this reclassification be considered during the Finance Recommendation stage of the Operating Budget process

of FTEs: Does your proposal change the total number of FTE positions for an existing classification?

No – No change to # of FTEs

Yes – Includes proposed change to # of FTEs

If yes, provide the position classification and briefly describe the change:

Click or tap here to enter text.

New Positions: Does your proposal create a new position? (i.e. position with no existing classification)

No – No new positions

Yes – Includes proposed new positions

If yes, submit a draft position description with your proposal and briefly describe the change here:

Click or tap here to enter text.

Explain the impact of your proposed personnel change(s). Will there be a change to current activities or service levels? Why is this change needed in the 2024 budget?

The change reflects a reclassification approved in June 2023 for an employee who had been working out of class for many months and continues in project management roles

Explain how your proposed personnel change(s) will align with your draft Department Equity Action Plan. Will the change(s) address specific inequities or advance other equity goals?

This bilingual position includes translation and interpretation roles, which strongly support two goals within the Planning Division Equity Action Plan, which are to “stop creating inaccessible materials and presentations” and to “stop making grant programs so complicated for applicants”.