CITY OF WHITEWATER, WISCONSIN

2026 Mid-Year Strategic Goal Review

The first progress report against the five strategic goals adopted in the Common Council's recent refresh, compiled from thirteen City departments and divisions.

Presented by John Weidl, City Manager
Open Session, Common Council

City of WHITEWATER
Live • Work • Play • Learn

Stonehaven single-family homes rising on Bluff Road, with the Tanis industrial condominium development and the Summerset Marine site beyond — Goals 1 and 3 in a single frame.

Purpose and Method

What this review covers, and how it was assembled.

13

Reporting units

Every department and division submitted against the goals.

5

Strategic goals

The framework as refreshed by the Common Council this cycle.

1st

Review of its kind

The first report against the goals as refreshed by the Council.

How this report is organized

Department submissions have been reorganized around the five strategic goals rather than by department. Work that spans multiple departments is presented once, under the goal it serves, so the Council evaluates the City's progress rather than comparing departments against one another.

This is a first cycle

These five goals come from the Council's recent refresh, and this is the first review conducted against them. A full strategic planning process is scheduled for 2027. The measures established this year are built to carry into that process rather than be replaced by it.

The Five Goals at a Glance

Departments contributing to each goal, as reported in the first submissions against the refreshed goals.

1 **Expand Housing Opportunities and Support Responsible Growth**

Affordable and workforce housing; responsible residential, commercial and mixed-use development.

9 departments

2 **Enhance Communication, Transparency, and Engagement**

Accessible, transparent and proactive outreach to residents, students and businesses.

9 departments

3 **Support Economic Development and Tax Base Expansion**

Existing business support, new investment, downtown revitalization and entrepreneurship.

7 departments

4 **Foster a Vibrant, Engaged, and Welcoming Community**

Downtown vitality, recreation, events, beautification, and University and School District partnerships.

8 departments

5 **Ensure Long-Term Financial Stability and Strategic Investment**

Responsible budgeting, capital planning, infrastructure prioritization and service efficiency.

9 departments

1 Housing and Responsible Growth

Increase affordable and workforce housing while encouraging responsible residential, commercial and mixed-use development.

Residential development delivered and underway

Project	Units	Value	Status
Moraine Reserve	128	$30.0M	First two buildings up
US Shelter, Meadowview	38	$15.2M	65 percent complete
Harbor Homes, Park Crest	19	$7.8M	Complete
Stonehaven, Bluff Road	14	$4.8M	4 under construction
Total	**199**	**$57.8M**	

Values are at full buildout and exclude Water’s Edge South and the Habitat for Humanity duplex.

Permits issued, January through June 2026: 6 single-family homes, 5 duplex buildings (10 units) and 96 apartment units — 112 units in total.

Home Renewal Program launched

A $1.2 million owner-occupied rehabilitation program opened in April 2026, supported by a contractor luncheon and a marketing rollout. The first application, seeking $23,000, is under eligibility review.

Ownership access sustained

Down Payment Assistance continues with fourteen active borrowers, including five loans totaling $125,000 awarded this year with $350,000 remaining. Finance, Community Development and Legal jointly structured the Stonehaven financing.

199
Housing units delivered or under development

$57.8M
Estimated private investment at full buildout

$1.2M
Committed to owner-occupied housing rehabilitation

1 Housing and Responsible Growth

Increase affordable and workforce housing while encouraging responsible residential, commercial and mixed-use development.

Underway through the balance of 2026

- Hospital Hill: coordinating sanitary sewer and water main alignment with two prospective developers on Starin Road east of Jefferson Street.
- Utility installation folded into the $3.99 million Jefferson Street reconstruction, saving an estimated $45,000 on the Hospital Hill sanitary sewer and water main versus separate construction.
- Plan revisions and DNR permitting for sewer and water main installation and relocation.
- Whitewater Forward Comprehensive Plan update advancing through the citizen work group and public workshops.
- Continued evaluation of infill residential sites and a potential new subdivision.
- Fire and EMS plan review, inspection and code enforcement on all new residential and mixed-use construction.

What we will measure

Baseline established 2026, reported against beginning 2027.

- Permitted units by type, year over year
- Units delivered at or below workforce affordability thresholds
- Down payment and rehabilitation program participation and dollars deployed
- Infill share of total residential permits

CONTRIBUTING DEPARTMENTS

Community Development, Public Works, Finance, Fire and EMS, City Attorney, GIS, Media Services, Clerk

2 Communication, Transparency and Engagement

Improve communication with residents, students, businesses and community organizations through accessible and proactive outreach.

Public meeting access maintained

Council and board meetings are livestreamed, recorded and published on the City's PEG channel and YouTube, with posted agendas, packets and minutes.

Municipal finance explained in plain terms

Produced Referendum Taxes Explained and How the Municipal Budget Is Created, alongside website navigation and library reservation tutorials.

Direct engagement expanded

Whitewater Forward citizen work group and public workshops, Business Retention and Expansion visits with the Chamber, and presentations to the Greater Whitewater Committee and service clubs.

Bilingual access broadened

Parks and Recreation now provides the majority of public-facing materials in both English and Spanish.

100%

Council and board meetings
livestreamed, recorded and published

2

Municipal finance explainers produced:
referendum taxes and the budget process

Bilingual

Majority of Parks and Recreation
public materials now in English and Spanish

2 Communication, Transparency and Engagement

Improve communication with residents, students, businesses and community organizations through accessible and proactive outreach.

Underway through the balance of 2026

- Redesigning the budget document with clearer graphs and visual explanation of where revenue originates and where it is spent.
- Developing evergreen municipal finance education content with Media Services.
- Proactive education with the assessors on how assessment is conducted and how it affects the tax bill.
- Including written responses to public comment in agenda packets and, where appropriate, on social media.
- Launching a Police Department video series with Media Services covering specialty programs and services.
- Continued technical support for livestreaming and publishing all public meetings.

What we will measure

Baseline established 2026, reported against beginning 2027.

- Meeting viewership and video reach by platform
- Public workshop and work group participation
- Response time on public records and public comment
- Share of public-facing materials available bilingually

CONTRIBUTING DEPARTMENTS

Media Services, Information Technology, Finance, Police, Library, Parks and Recreation, Community Development, Fire and EMS, City Attorney

3

Economic Development and Tax Base Expansion

Support existing businesses, attract new commercial and manufacturing investment, revitalize downtown and strengthen the tax base.

Summerset Marine Construction advanced

A project representing more than $15 million in private investment and a 150,000 square foot facility, supported through site work, entitlement and financing coordination.

Entrepreneurship pipeline filling storefronts

The WindUp pitch competition at the Innovation Center funded two new downtown ventures, and CDA lending is advancing two more — $100,000 approved for First Time Entertainment, $77,500 in process for Stellar Vintage — alongside Dunkin and several other openings.

Equalized value grew 6.8 percent

Total equalized value rose from $1.102 billion in 2025 to $1.177 billion in 2026, an increase of $75.0 million in a single year.

Increment building across five districts

The five active tax incremental districts now carry $76.9 million in incremental value, with TID 14 accounting for $45.1 million of that total.

+6.8%

Growth in total equalized value, 2025 to 2026

$76.9M

Incremental value across five active tax incremental districts

$15M+

Private investment in the Summerset Marine project

3

Economic Development and Tax Base Expansion

Support existing businesses, attract new commercial and manufacturing investment, revitalize downtown and strengthen the tax base.

Underway through the balance of 2026

- Jefferson Street downtown redevelopment request for proposals advancing to solicitation.
- Anderson Ashton letter of intent under review for the Bluff Road site: a Piggly Wiggly and an Early Childhood Education Center as one coordinated development.
- Evaluating future industrial land to expand business park inventory ahead of demand.
- Exploring creative financing for business park expansion and incentives while preserving debt capacity.
- Correcting address data and building an accurate housing inventory by type and tenure through GIS.
- CDA loan, grant and facade programs in continuous operation, with loan processes under joint review by Finance, Community Development and Legal.
- Coordinated marketing of those programs through digital signage, video and social media.

What we will measure

Baseline established 2026, reported against beginning 2027.

- Equalized value and net new construction value, year over year
- Incremental value generated within active districts
- Commercial and industrial permits issued
- Loan, grant and facade dollars deployed and jobs supported

CONTRIBUTING DEPARTMENTS

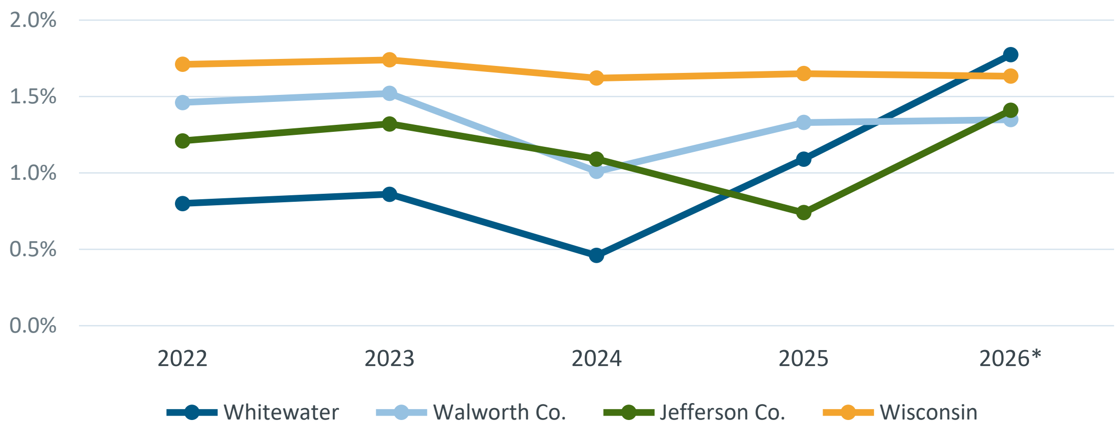
Community Development, Finance, GIS, Media Services, Fire and EMS, Parks and Recreation, City Attorney

NET NEW CONSTRUCTION

The only lever the City controls.

Under state levy limits, allowable levy growth is set by the value of new construction. Development activity is therefore not an amenity. It is the statutory mechanism that funds services. In 2026 Whitewater moved above both county rates and, narrowly, the statewide rate for the first time in five years.

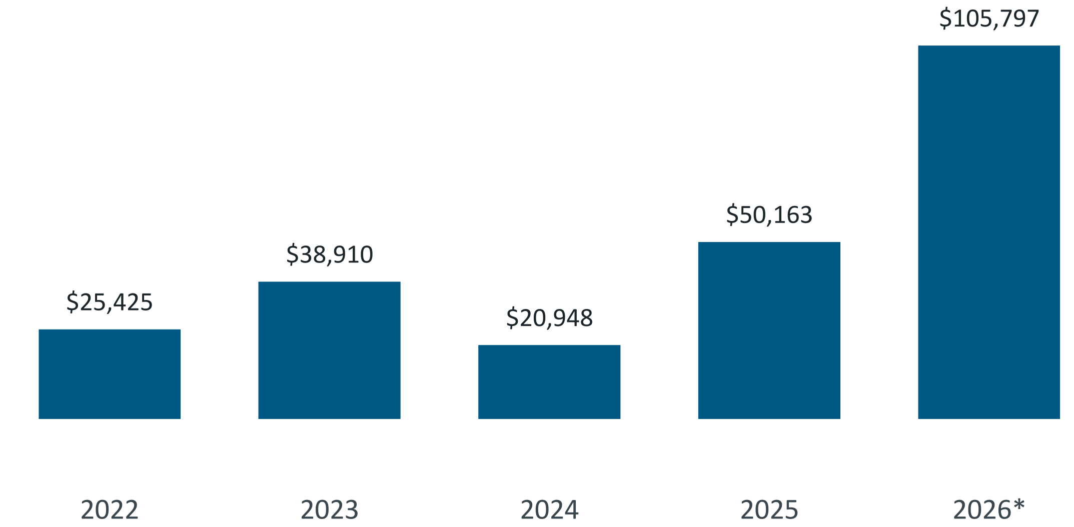
Net new construction as a percentage of prior year equalized value



Source: Wisconsin Department of Revenue. 2026 figures are preliminary. Finance will reconcile the levy limit worksheet against the Statement of Changes in Equalized Values before budget adoption.

New levy authority generated

Permanent, recurring capacity added to the levy by each year of construction.



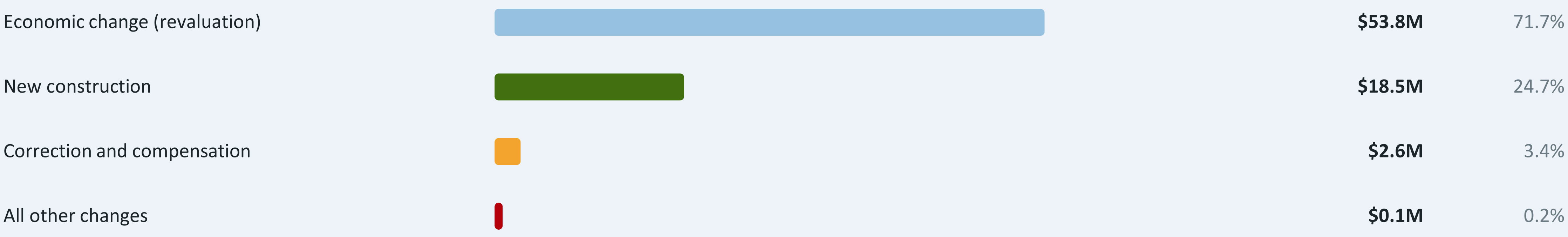
**Finance Department estimate pending DOR certification in August. It enters the 2027 budget as recurring authority and exceeds the prior two years combined. Net new construction value rose from $4.5 million in 2024 to $18.5 million per the preliminary DOR statement.*

NEW CONSTRUCTION VERSUS REVALUATION

Where the $75.0 million came from.

Equalized value grows two ways: property already on the roll is revalued, or something new is built. Only the second is within the City's control, and only the second reflects work the Council directed. Nearly a quarter of Whitewater's 2026 growth was new construction, a materially higher share than either county.

City of Whitewater, change in equalized value, 2025 to 2026



Share of value growth attributable to new construction

24.7%

Share of Whitewater's value growth attributable to new construction

15.9% / 15.3%

Comparable share in Walworth and Jefferson Counties

+27%

Growth in manufacturing equalized value, the fastest-growing class in the City

4 A Vibrant, Engaged and Welcoming Community

Enhance quality of life through downtown vitality, recreation, community events, beautification, and partnerships with the University and School District.

Downtown Activation Initiative approved

The Council approved the initiative and implementation begins in the second half, the first work program under the downtown emphasis added in the goal refresh. The Library Expansion and Renovation Project is also complete, adding capacity, meeting space and a Makerspace downtown.

Recognized as a Family Friendly Workplace

Human Resources obtained the designation and developed a Wellness Incentive Program supporting recruitment and retention.

University and School District partnerships deepened

Community-Based Learning, Innovation Center collaboration, capstone projects, job fairs, Whippets Pathways Day, library cards at school registration and space for the Alternative Education Program.

Recreation delivered at scale, events citywide

Recreation served 1,033 youth participants across 24 activities in the trailing twelve months, with 994 afterschool and camp registrations and 548 swim lessons, alongside Special Olympics, the Fourth of July parade, Savory Sounds, Concerts in the Park, Christmas at Cravath, the STEAM Faire and the Whitewater Storytelling Festival.

4,097
Library visits each month

1,033
Youth recreation participants across 24 activities, trailing twelve months

$10M+
Proposed Piggly Wiggly and Early Childhood Education Center, one development, two buildings

4 A Vibrant, Engaged and Welcoming Community

Enhance quality of life through downtown vitality, recreation, community events, beautification, and partnerships with the University and School District.

Underway through the balance of 2026

- Standing up implementation of the Council-approved Downtown Activation Initiative, including scope, sequencing and first-phase deliverables.
- Advancing the Anderson Ashton letter of intent for 7.21 City-owned acres on Bluff Road: a 30,000 square foot Piggly Wiggly and a 12,000 square foot Early Childhood Education Center, developed together as one project.
- Review and update of the Comprehensive Outdoor Recreation Plan, with long-range planning for parks, trails and open space.
- Collaboration with UW-Whitewater at the Innovation Center on student and graduate retention.
- Using housing and downtown investment programs to stabilize neighborhoods and build household equity.

What we will measure

Baseline established 2026, reported against beginning 2027.

- Downtown storefront occupancy and event activity
- Program participation and event attendance, year over year
- Library visits, circulation and program attendance
- Park and facility utilization

CONTRIBUTING DEPARTMENTS

Parks and Recreation, Library, Community Development, Human Resources, Media Services, Fire and EMS, Finance, City Attorney

5 Long-Term Financial Stability and Strategic Investment

Align spending and capital investment with available resources through responsible budgeting, long-term planning and service efficiency.

Reserves above the adopted policy minimum

Unassigned general fund balance stood at $3,029,332 on December 31, 2025, equal to 21.3 percent of expenditures against an adopted policy minimum of 20 percent.

Debt service delivered under budget

2025 debt service of $1,952,572 closed at 13.9 percent of total revenue against 14.4 percent budgeted, a favorable variance produced by revenue outperforming projection.

Debt capacity preserved

Following the 2026 issuance, general obligation principal of $33.8 million sits against a $58.9 million statutory limit, leaving $25.0 million of statutory capacity and $7.4 million under the tighter City policy limit.

Tax increment districts performing

Four of five active districts are cash flow positive and are projected to close ahead of their statutory deadlines, returning value to all taxing jurisdictions sooner than required.

21.3%
Unassigned general fund balance against a 20 percent adopted policy minimum

13.9%
Debt service as a share of 2025 revenue, below the 14.4 percent budgeted

$25.0M
Remaining general obligation capacity under the statutory limit

5 Long-Term Financial Stability and Strategic Investment

Align spending and capital investment with available resources through responsible budgeting, long-term planning and service efficiency.

Underway through the balance of 2026

- Optimizing the self-funded health plan: the loss ratio has improved from 205.9 percent in 2025 to 128.2 percent through May against a 100 percent target, supported by the zero-cost employee option tied to the preferred network, which now carries 55 percent of utilization.
- ETF, the group program the City exited, has since announced weighted average premium increases for local municipalities of 11.2 percent for 2025 and 11.5 percent for 2026, roughly 24 percent compounded.
- Updating the Capital Improvement Policy and developing strategies to reduce future borrowing.
- Compiling asset inventories covering condition, useful life and replacement cost: the Wastewater Utility is 90 percent complete, with the Water Utility and Street Department each at 70 percent.
- Studying the feasibility of in-house construction services in place of exclusive reliance on outside consulting engineers.
- Building a multi-year technology replacement plan and a Cybersecurity Incident Response Plan and response team.
- Sustaining the efficiency gains from the unified Community Development structure and from standardized legal templates and electronic signatures.
- Completing the Police Evidence and Training Building — foundation poured, 22 percent of the $1.02 million anticipated cost paid, on target for late October — and bringing the fire training facility online by year end.

What we will measure

Baseline established 2026, reported against beginning 2027.

- Police overtime per 1,000 calls for service against the 2025 baseline, now that authorized staffing is in place
- Health plan loss ratio against the 100 percent target, reported quarterly
- Outside engineering and consulting spend, establishing the baseline for the in-house construction services study
- Asset inventories complete and the replacement backlog dollarized by year end

CONTRIBUTING DEPARTMENTS

Finance, Public Works, Human Resources, Information Technology, Police, Fire and EMS, Community Development, Parks and Recreation, City Attorney

Second-Half Priorities

Six items carry the greatest consequence between now and year end.

1

Whitewater Forward

Advance the comprehensive plan update through the citizen work group and public workshops so it informs the 2027 strategic planning process.

Goals 1 and 3

2

Capital planning foundation

Adopt the updated Capital Improvement Policy and borrowing reduction strategy, and finish the water, wastewater and street asset inventories that support it.

Goal 5

3

Public safety facilities

Complete the Police Evidence and Training Building and bring the fire training facility online by year end.

Goal 5

4

Jefferson Street corridor

Complete design and DNR permitting so utility work is delivered inside the reconstruction, and advance the downtown redevelopment RFP.

Goals 1, 3 and 5

5

Piggly Wiggly and ECEC

Advance the Anderson Ashton letter of intent for the Bluff Road site to a decision on conveyance and City participation.

Goals 3 and 4

6

Downtown Activation Initiative

Move the Council-approved initiative into implementation and report first-phase progress with the year-end review.

Goal 4

BUILDING THE MEASUREMENT FRAMEWORK

2026 is the baseline year.

This is the first review against the Council's refreshed goals, so there is no prior year to compare against. The steps below establish that comparison and carry it into the full strategic planning process scheduled for 2027.

Q3 2026

Standardize the instrument

Issue a single reporting template to every department, with a defined data call specifying the exact figures each is responsible for producing.

Q4 2026

Establish baselines

Capture 2026 values for each measure named in this review, including permit activity, equalized value, fund balance, levy position and program participation.

Q4 2026

Embed in the 2027 budget

Present goal-linked measures with the budget submission, and deliver the year-end review in the standardized format.

2027

Carry into strategic planning

Bring two years of measured performance into the full strategic planning process, so the next set of goals is built on evidence rather than starting from a blank page.

Requested action: receive and file. No Council action is required at this time.

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