



**Heritage Heights NID #5**

***Reinvent Where You Live Heritage Heights Your Destination  
Neighborhood***

**NEIGHBORHOOD IMPROVEMENT DISTRICT NO. 5**

**HERITAGE  
HEIGHTS**

**2024  
OPERATING PLAN**

September, 2023

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## I. INTRODUCTION

### A. Background

In 2006, the State of Wisconsin signed into law, the 2005 Wisconsin ACT 186, a legislative declaration created to give Wisconsin municipalities (i.e., cities, villages, and towns) the power to establish one or more Neighborhood Improvement Districts (NIDs) within their community. Neighborhood Improvement Districts focus on neighborhoods composed exclusively of large multifamily housing units or mix of businesses and multifamily housing. An assessment methodology is developed to allow the assessable residential and commercial properties within the geographic area to contribute to programs aimed at neighborhood lighting, distinctive signage, and pocket-parks, enhanced public green spaces and other activities as approved by the NID Board. The ACT was drafted similar to the business improvement district.

The Heritage Heights Neighborhood Improvement District #5 was created in 2016 (Resolution #160892), for the purpose of revitalizing and improving the neighborhood area on Milwaukee's Northwest side location (see Appendix A). This document is the Operating Plan for the Heritage Heights District #5. The NID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

## II. DISTRICT BOUNDARIES

Boundaries of NID #5. Discussion ensued on the properties to be included in the Neighborhood Improvement District. It was decided that included properties would be those properties fronting Metro Boulevard (south side), those properties fronting 107th St., specifically 6577 N. 107th, then 6755 N. 107th St. North to West Metro Blvd., and properties on N108th St, N109th St., N110th St. N112th St., Coventry Ct., N113 St., N114th St., W Green Tree Rd., W Daphne St., W. Heritage Dr., W. Sanctuary Dr., Meadowcreek Ct., and W. Meadowcreek Dr. The 193 included properties are shown in the attached spreadsheet.

There are 211 properties within the NID #5, and the current assessed value of these properties is \$109,202,560.

## III. OPERATING PLAN

### A. Plan Objectives

The objective of NID #5 is to: To improve and maintain Storm Water Efficiency while creating a flood-hazard-resilient neighborhood. Additionally, we plan to increase resident awareness of vulnerable flood hazards, while maintain, enhance, and restore our natural areas to eliminate or minimize disruption.

Additionally, we have begun an exploratory effort with the University of Wisconsin – Milwaukee School of Fresh Water Sciences to develop a "*park like*", scenic and complementary environment/multi-use recreational area for our residents near our retention pond. We plan to accomplish this initiative with minimal NID cost, by seeking available State, Local and Federal grants. (See Appendix C)

Continue to develop our lawn appeal initiative with our mailbox and yard lamp-post replacement program.

Continue to ensure Code Compliance including all repairs necessary to remedy an existing code violation by enforcing our current neighborhood bylaws.

Promotion of Safety Improvements including, a neighborhood surveillance camera system (i.e. Ring neighborhood) get to know your neighbor, adopt a block and other safety projects.

Improvement of our Entrance Appeal including improvement of the monument and grounds with professional landscaping, signage, and other aesthetic enhancements.

Continue to provide/assist and generate opportunities that support civic engagement, generate new cultural events or green spaces in the neighborhood to drive community change.

Rescheduling of our annual Summer Social including our 22nd year celebration; along with other neighborhood community parties/holiday events and community building activities.

#### B. Activities – 2024

Principle activities that will be engaged in/continued by the NID during the 2022 year of operation will include:

- a) Storm Water Management continued maintenance, necessary repairs, and protection of area unobstructed water flow.
- b) Taxes, maintenance, and upkeep of the land surrounding the monument area at the entrance of the subdivision.
- c) Plan development of retention pond walking path and park enhancement area.
- d) Explore the possibility of securing and placing a land monument at the subdivision rear entrance.
- e) Hosting a minimum of two (2) community engagement and building subdivision activities
- f) NID Facebook page enhancement/upgrade.
- g) Bylaw's development of policies and procedures that continues the effective enforcement of deed restrictions and neighborhood covenants.
- h) Establish a Communication - Electronic file cabinet and neighborhood newsletter.
- i) Implement a Neighborhood Walking Tour for current and perspective neighbors.
- j) Reenforce use of the Neighborhood Ambassador program and Adopt a Block program to reinforce neighborhood stability.

C. Expenditures – 2024

2024 Budget

INCOME: \$20,300

Storm Water Management	\$3,300
Taxes and maintenance of monument land	\$1,000
Monument Landscaping & improvements	\$5,000
Pond Walking Path Development	\$4,000
Property Improvement Grants	\$3,000
Administrative expenses	\$2,000
Community building activities	\$1,000
Reserves/misc.	\$1,000
<b>Total</b>	<b>\$20,300</b>

D. Financing Method

The 2024 \$20,300 income will be realized through NID #5 assessments (see Appendix B). The NID #5 Board after receiving input from our residents has prioritize expenditures and will continue to revise the budget as necessary to match the funds actually available.

E. Organization of NID #5 Board

The Board of Directors elected represent a cross section of our Heritage Heights NID residents which includes professionals currently employed and retirees who are dedicated to improving our community. Additionally, we are aggressively pursuing a permanent regular voice from our business partner(s). The board talent pool is very strong and diverse.

- **Chairperson:** D. Winston
- **Vice Chairperson:** A. Chapman
- **Treasure:** T. Finkley
- **Secretary:** E. Roberson
- **Director:** P. Thadison
- **Director:** M. McClain
- **Director:** D. McKay
- **Director:** L. Thompson
- **Advisory Special Committee:** C. Carson-Clark
- **Advisory GHNA:** S. Smith
- **Advisory ARC:** R. Roberts
- **Advisory:** TBD (Business Representative)

NID #5 elected our current directors to the Annual Board meeting consistent with terms of our Board subsection and the bylaws of the Heritage Heights NID #5. The board's primary responsibility will be implementation of this Operating Plan.

F. Relationship to the Granville Heritage Neighborhood Association (GHNA).

The NID #5 is a separate entity from the Granville Heritage Neighborhood Association (GHNA), notwithstanding the fact that members, officers, and directors of each may be shared. The Association shall remain a private organization, not subject to the open meetings law, and not subject to the public record law except for its records generated in connection with the NID board. The Association may, and it is intended, shall, contract with the NID to provide services to the NID, in accordance with this Plan.

G. The NID #5 does not hold or own property.

IV. METHOD OF ASSESSMENT

A. Assessment Rate and Method

The Heritage Heights Neighborhood Improvement District #5 board of directors unanimously approved a \$100 uniform assessment for homes and \$200 uniform assessment for businesses method per taxable property included within the NID #5 boundaries for 2022.

Tax Key: 1140183000, Address: 10821 W Metro Auto Mall, Owner: Metro Auto Park Assoc., Land Value: \$4,600 was not assessed because the land is unbuildable or usable due to its location within the business park.

The principle behind the assessment methodology is that each property should contribute to the NID in proportion to the benefit derived from the NID.

After consideration of other assessment methods, it was determined that assessed value of a property was the characteristic most directly related to the potential benefit provided by the NID. Therefore, a fixed assessment on the assessed value of the property was selected as the basic assessment methodology for this NID.

As of January 1, 2023, the property in NID #5 had a total assessed value of over \$90 million dollars.

Appendix B shows the assigned NID assessment for each property included in the district.

V. 2022 OPERATING PLAN

A. Phased Development

NID #5 will continue to revise and develop the Operating Plan annually, in response to changing development needs and opportunities in the district, in accordance with the purposes and objectives defined in this initial Operating Plan.

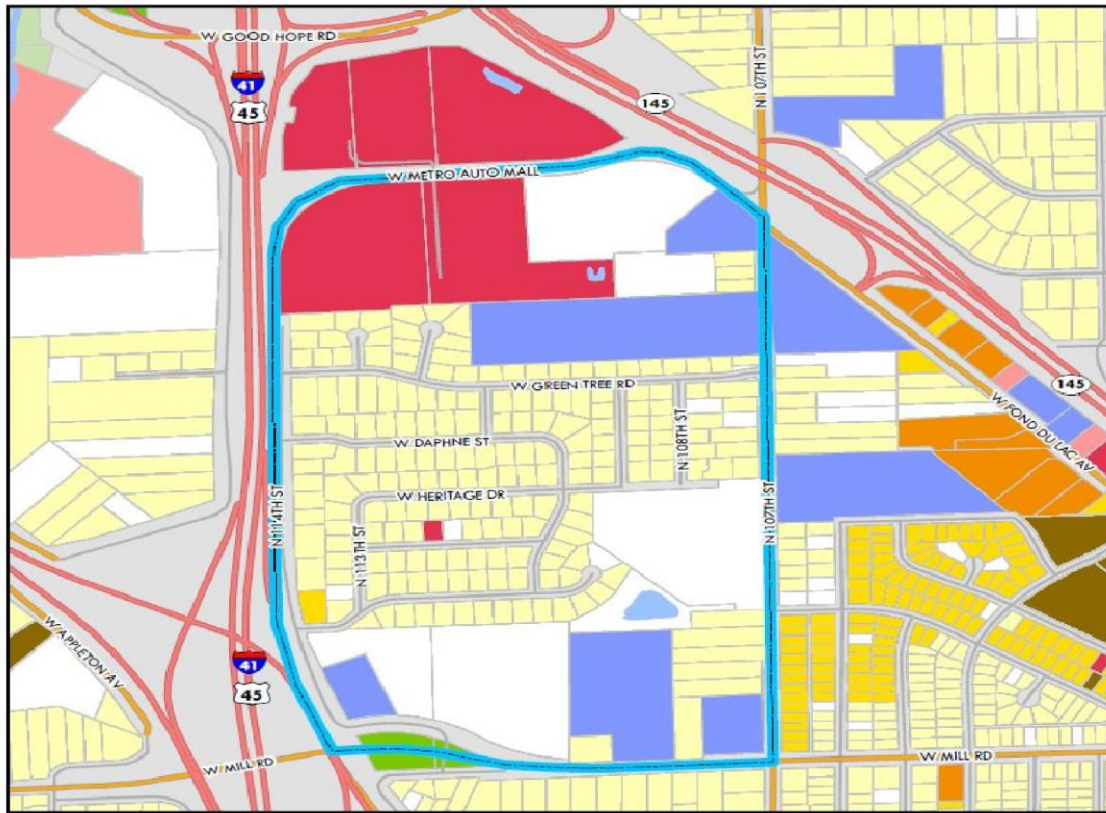
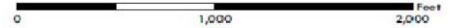
NID #5 Operating Plan will continue to apply the approved assessment formula, as adjusted, to raise funds to meet the next annual budget. However, the method of assessing will not be materially altered, except with the consent of the City of Milwaukee.

# APPENDIX



# HERITAGE HEIGHTS NEIGHBORHOOD PROPOSED NEIGHBORHOOD INVESTMENT DISTRICT

Prepared by the Dept. of City Development Planning Division, 4/28/2016  
Source: City of Milwaukee Information Technology Management Division

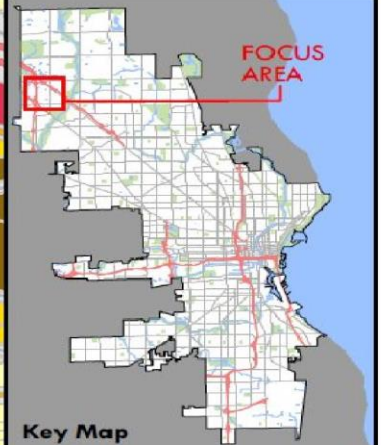


**Legend**

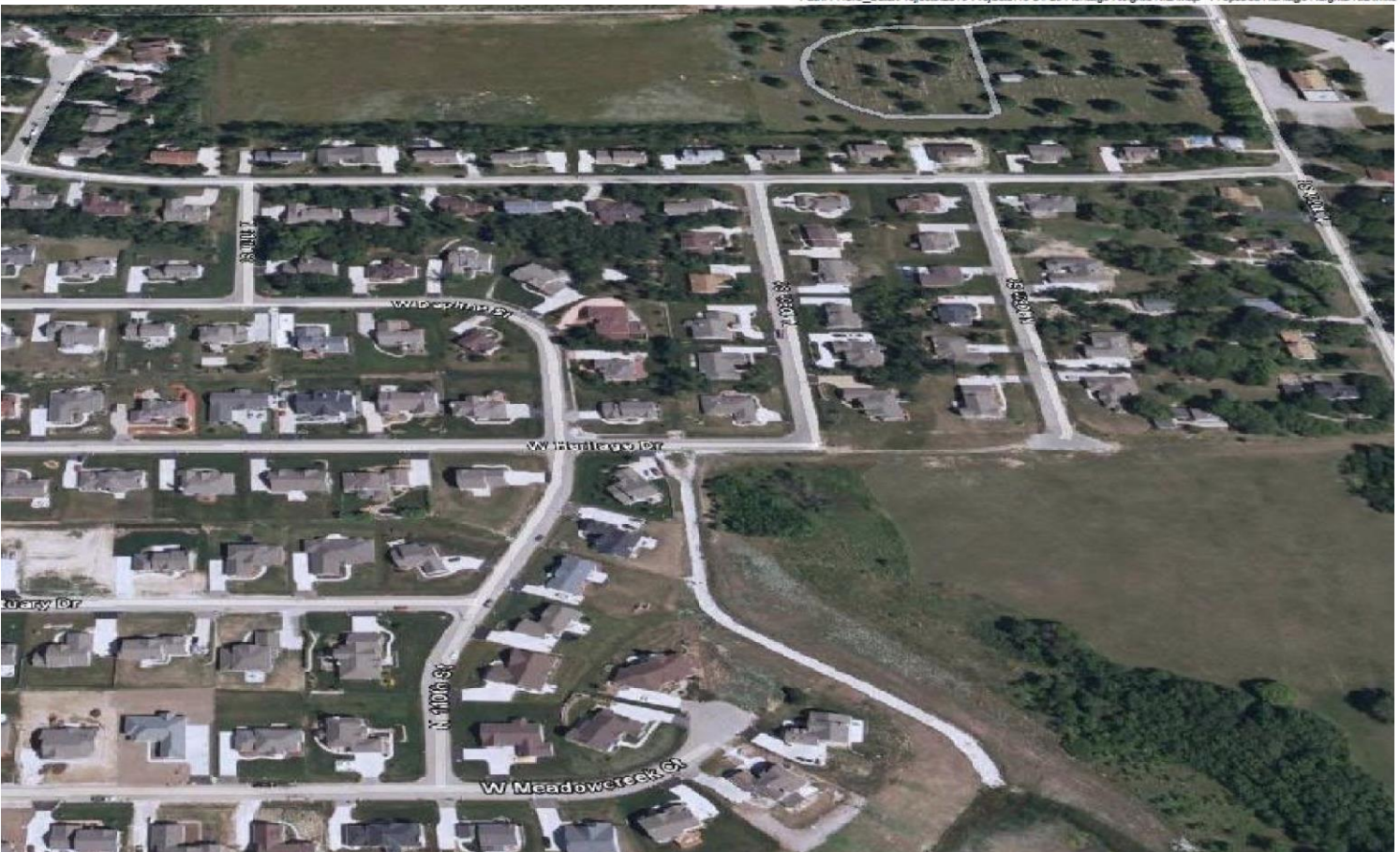
- Proposed NID Boundary
- Parcel Boundary

**Land Use**

- Single Family
- Duplex
- Multi-Family
- Condominiums
- Commercial
- Mixed-Use
- Public / Quasi-Public Buildings
- Public / Quasi-Public Open Space
- Vacant Land



Path: F:\GIS\_Data\Projects\2016 Projects\16-04-25 Heritage Heights NID\Map - Proposed Heritage Heights NID.mxd



**Appendix A**



Property Assessment Methodology:

- 195 Residential properties were assessed at \$100.00 annual tax revenue  
Total = \$19,500.
- 4 Commercial properties assessed at \$200.00 annual tax revenue  
Total = \$800.

**Exempt properties**

- |                                   |                           |
|-----------------------------------|---------------------------|
| 1. West Grandville Cemetery Assn  | 6805 N. 107 Street        |
| 2. West Grandville Church         | 6925 N. 107 Street        |
| 3. Northview United Church        | 10710 W. Mill Rd.         |
| 4. Salem Evangelical Lutheran     | 11123 W. Green Tree Rd    |
| 5. Salem Evangelical Lutheran     | 11034 W. Green Tree Ave   |
| 6. City of Milwaukee              | 10915-R W. Meadowcreek Dr |
| 7. New Restoration Church         | 11248 West Mill Rd        |
| 8. Heritage Heights SWM Pond      | 10705 W. Green Tree       |
| 9. St Mark AME Church             | 6626 N. 114 Street        |
| 10. Wisconsin Corp OF Seventh Day | 10900 W. Mill Rd          |
| 11. City of Milwaukee School      | 6577 N. 107               |
| 12. Metro Auto Association        | 10821 W Metro Auto Mall   |
- Special Note:** Tax Key: 1140183000, not assessed because the land is unbuildable and usable due to its location within the business park.

<b>Taxkey</b>	<b>Address</b>	<b>NID 5 Assessment</b>
1140121000	11330 W GREEN TREE RD	\$ 100.00
1140122000	11320 W GREEN TREE RD	\$ 100.00
1140131000	6840 N 114TH ST	\$ 100.00
1140141000	6826 N COVENTRY CT	\$ 100.00
1140142000	6836 N COVENTRY CT	\$ 100.00
1140143000	6835 N COVENTRY CT	\$ 100.00
1140144000	6825 N COVENTRY CT	\$ 100.00
1140145000	6811 N COVENTRY CT	\$ 100.00
1140146000	6820 N 114TH ST	\$ 100.00
1140191000	6885 N 107TH ST	\$ 100.00
1140192000	6875 N 107TH ST	\$ 100.00
1140193000	6865 N 107TH ST	\$ 100.00
1149972110	11308 W GREEN TREE RD	\$ 100.00
1460001000	11230 W DAPHNE ST	\$ 100.00
1460002000	11210 W DAPHNE ST	\$ 100.00
1460003000	11140 W DAPHNE ST	\$ 100.00
1460012000	10800 W MILL RD	\$ 100.00
1460021100	6768 N 114TH ST	\$ 100.00
1460032100	10920 W MILL RD	\$ 100.00
1460041000	6475 N 107TH ST	\$ 100.00
1460042000	6459 N 107TH ST	\$ 100.00
1460061100	11313 W GREEN TREE RD	\$ 100.00
1460062100	11301 W GREEN TREE RD	\$ 100.00
1460071000	11313 W DAPHNE ST	\$ 100.00
1460072000	11303 W DAPHNE ST	\$ 100.00
1460081100	11235 W GREEN TREE RD	\$ 100.00
1460082100	11221 W GREEN TREE RD	\$ 100.00
1460083000	11209 W GREEN TREE RD	\$ 100.00
1460084000	11137 W GREEN TREE RD	\$ 100.00
1460086000	11107 W GREEN TREE RD	\$ 100.00
1460087000	10722 W GREEN TREE RD	\$ 100.00
1460088000	10740 W GREEN TREE RD	\$ 100.00
1460089000	10800 W GREEN TREE RD	\$ 100.00
1460090000	10814 W GREEN TREE RD	\$ 100.00
1460091000	10830 W GREEN TREE RD	\$ 100.00
1460092000	10904 W GREEN TREE RD	\$ 100.00
1460093000	10920 W GREEN TREE RD	\$ 100.00
1460094000	10936 W GREEN TREE RD	\$ 100.00
1460095000	11008 W GREEN TREE RD	\$ 100.00
1460096000	11022 W GREEN TREE RD	\$ 100.00
1460098000	10706 W GREEN TREE RD	\$ 100.00
1460099000	11033 W GREEN TREE RD	\$ 100.00
1460100000	11019 W GREEN TREE RD	\$ 100.00
1460101000	11007 W GREEN TREE RD	\$ 100.00
1460102000	10935 W GREEN TREE RD	\$ 100.00
1460103000	10921 W GREEN TREE RD	\$ 100.00

1460104000	10905 W GREEN TREE RD	\$ 100.00
1460105000	10823 W GREEN TREE RD	\$ 100.00
1460106000	10807 W GREEN TREE RD	\$ 100.00
1460107000	10741 W GREEN TREE RD	\$ 100.00
1460108000	10705 W GREEN TREE RD	\$ 100.00
1460111000	6761 N 109TH ST	\$ 100.00
1460112000	6749 N 109TH ST	\$ 100.00
1460113000	6735 N 109TH ST	\$ 100.00
1460114000	6721 N 109TH ST	\$ 100.00
1460115000	6718 N 110TH ST	\$ 100.00
1460116000	6732 N 110TH ST	\$ 100.00
1460117000	11000 W DAPHNE ST	\$ 100.00
1460118000	11004 W DAPHNE ST	\$ 100.00
1460119000	11016 W DAPHNE ST	\$ 100.00
1460120000	11028 W DAPHNE ST	\$ 100.00
1460121000	11124 W DAPHNE ST	\$ 100.00
1460122000	11039 W DAPHNE ST	\$ 100.00
1460123000	11027 W DAPHNE ST	\$ 100.00
1460124000	11015 W DAPHNE ST	\$ 100.00
1460125000	11001 W DAPHNE ST	\$ 100.00
1460131000	11227 W DAPHNE ST	\$ 100.00
1460132000	11211 W DAPHNE ST	\$ 100.00
1460133000	11139 W DAPHNE ST	\$ 100.00
1460134000	11127 W DAPHNE ST	\$ 100.00
1460142000	11110 W GREEN TREE RD	\$ 100.00
1460143000	6810 N 112TH CT	\$ 100.00
1460144000	6820 N 112TH CT	\$ 100.00
1460145000	6836 N 112TH CT	\$ 100.00
1460146000	6846 N 112TH CT	\$ 100.00
1460147000	6856 N 112TH CT	\$ 100.00
1460148000	6845 N 112TH CT	\$ 100.00
1460149000	6835 N 112TH CT	\$ 100.00
1460150000	6825 N 112TH CT	\$ 100.00
1460151000	11210 W GREEN TREE RD	\$ 100.00
1460161000	6679 N 107TH ST	\$ 100.00
1460171000	6705 N 107TH ST	\$ 100.00
1460172000	6724 N 108TH ST	\$ 100.00
1460173000	6725 N 108TH ST	\$ 100.00
1460174000	6722 N 109TH ST	\$ 100.00
1460181000	6764 N 109TH ST	\$ 100.00
1460182000	6765 N 108TH ST	\$ 100.00
1460183000	6752 N 109TH ST	\$ 100.00
1460184000	6745 N 108TH ST	\$ 100.00
1460185000	6740 N 109TH ST	\$ 100.00
1460186000	6733 N 108TH ST	\$ 100.00
1460187000	6756 N 108TH ST	\$ 100.00
1460188000	6725 N 107TH ST	\$ 100.00

1460189000	6742 N 108TH ST	\$ 100.00
1460190000	6721 N 107TH ST	\$ 100.00
1460191000	6728 N 108TH ST	\$ 100.00
1460192000	6715 N 107TH ST	\$ 100.00
1460201000	6705 N 108TH ST	\$ 100.00
1460202000	6700 N 109TH ST	\$ 100.00
1460203000	10908 W HERITAGE DR	\$ 100.00
1460204000	10932 W HERITAGE DR	\$ 100.00
1460211000	11010 W HERITAGE DR	\$ 100.00
1460212000	11018 W HERITAGE DR	\$ 100.00
1460213000	11030 W HERITAGE DR	\$ 100.00
1460214000	11038 W HERITAGE DR	\$ 100.00
1460215000	11112 W HERITAGE DR	\$ 100.00
1460216000	11130 W HERITAGE DR	\$ 100.00
1460217000	11140 W HERITAGE DR	\$ 100.00
1460218000	11210 W HERITAGE DR	\$ 100.00
1460219000	11230 W HERITAGE DR	\$ 100.00
1460220000	11250 W HERITAGE DR	\$ 100.00
1460221000	11260 W HERITAGE DR	\$ 100.00
1460222000	6665 N 113TH ST	\$ 100.00
1460223000	11001 W HERITAGE DR	\$ 100.00
1460224000	11021 W HERITAGE DR	\$ 100.00
1460225000	11033 W HERITAGE DR	\$ 100.00
1460226000	11101 W HERITAGE DR	\$ 100.00
1460227000	11121 W HERITAGE DR	\$ 100.00
1460228000	11135 W HERITAGE DR	\$ 100.00
1460229000	11201 W HERITAGE DR	\$ 100.00
1460230000	11225 W HERITAGE DR	\$ 100.00
1460231000	11241 W HERITAGE DR	\$ 100.00
1460232000	6666 N 110TH ST	\$ 100.00
1460241000	6704 N 108TH ST	\$ 100.00
1460242000	6671 N 107TH ST	\$ 100.00
1460251000	11001 W MEADOWCREEK DR	\$ 100.00
1460252000	10949 W MEADOWCREEK CT	\$ 100.00
1460253000	10939 W MEADOWCREEK CT	\$ 100.00
1460254000	10929 W MEADOWCREEK CT	\$ 100.00
1460255000	10915 W MEADOWCREEK CT	\$ 100.00
1460256000	10901 W MEADOWCREEK CT	\$ 100.00
1460257000	10900 W MEADOWCREEK CT	\$ 100.00
1460258000	10910 W MEADOWCREEK CT	\$ 100.00
1460259000	10930 W MEADOWCREEK CT	\$ 100.00
1460260000	10940 W MEADOWCREEK CT, Unit .	\$ 100.00
1460261000	6616 N 110TH ST	\$ 100.00
1460262000	6626 N 110TH ST	\$ 100.00
1460263000	6640 N 110TH ST	\$ 100.00
1460264000	6650 N 110TH ST	\$ 100.00
1460265000	6619 N 110TH ST	\$ 100.00

1460266000	6605 N 110TH ST	\$ 100.00
1460267000	11004 W SANCTUARY DR	\$ 100.00
1460268000	11014 W SANCTUARY DR	\$ 100.00
1460271000	11224 W SANCTUARY DR	\$ 100.00
1460272000	11212 W SANCTUARY DR	\$ 100.00
1460273000	11202 W SANCTUARY DR	\$ 100.00
1460274000	11126 W SANCTUARY DR	\$ 100.00
1460275000	11116 W SANCTUARY DR	\$ 100.00
1460276000	11106 W SANCTUARY DR	\$ 100.00
1460277000	11024 W SANCTUARY DR	\$ 100.00
1460278000	6645 N 113TH ST	\$ 100.00
1460279000	6641 N 113TH ST	\$ 100.00
1460280000	6635 N 113TH ST	\$ 100.00
1460281000	6625 N 113TH ST	\$ 100.00
1460282000	11221 W SANCTUARY DR	\$ 100.00
1460283000	11211 W SANCTUARY DR	\$ 100.00
1460284000	11201 W SANCTUARY DR	\$ 100.00
1460285000	11125 W SANCTUARY DR	\$ 100.00
1460286000	11115 W SANCTUARY DR	\$ 100.00
1460287000	11105 W SANCTUARY DR	\$ 100.00
1460288000	11021 W SANCTUARY DR	\$ 100.00
1460291000	6710 N 114TH ST	\$ 100.00
1460292000	6700 N 114TH ST	\$ 100.00
1460301000	11222 W MEADOWCREEK DR	\$ 100.00
1460302000	11214 W MEADOWCREEK DR	\$ 100.00
1460303000	11204 W MEADOWCREEK DR	\$ 100.00
1460304000	11124 W MEADOWCREEK DR	\$ 100.00
1460305000	11114 W MEADOWCREEK DR	\$ 100.00
1460306000	11104 W MEADOWCREEK DR	\$ 100.00
1460307000	11010 W MEADOWCREEK DR	\$ 100.00
1460308000	11235 W MEADOWCREEK DR	\$ 100.00
1460309000	11225 W MEADOWCREEK DR	\$ 100.00
1460310000	11215 W MEADOWCREEK DR	\$ 100.00
1460311000	11201 W MEADOWCREEK DR	\$ 100.00
1460312000	11125 W MEADOWCREEK DR	\$ 100.00
1460313000	11115 W MEADOWCREEK DR	\$ 100.00
1460314000	11103 W MEADOWCREEK DR	\$ 100.00
1460315000	11011 W MEADOWCREEK DR	\$ 100.00
1460316000	6555 N 113TH ST	\$ 100.00
1460317000	6575 N 113TH ST	\$ 100.00
1469970000	6550 N 114TH ST	\$ 100.00
1469971000	6582 N 114TH ST	\$ 100.00
1469973100	6650 N 114TH ST	\$ 100.00
1469974100	6666 N 114TH ST	\$ 100.00
1469976000	11431 W DAPHNE ST	\$ 100.00
1469977113	11320 W DAPHNE ST	\$ 100.00
1469977114	11306 W DAPHNE ST	\$ 100.00

1469977200	11325 W DAPHNE ST	\$	100.00
1469978000	11330 W DAPHNE ST	\$	100.00
1469979000	6734 N 114TH ST	\$	100.00
1469981000	6781 N 107TH ST	\$	100.00
1469983110	6755 N 107TH ST	\$	100.00
1469995000	6535 N 107TH ST	\$	100.00
1469996000	6515 N 107TH ST	\$	100.00
1469997000	6505 N 107TH ST	\$	100.00
1140112100	11301 W METRO AUTO MALL	\$	200.00
1140181000	11011 W METRO AUTO MALL	\$	200.00
1140183000	10821 W METRO AUTO MALL	\$	-
1140201000	10901 W METRO AUTO MALL	\$	200.00
1140202000	10851 W METRO AUTO MALL	\$	200.00





**Appendix C**





**Appendix C**





## Appendix C

HERITAGE HEIGHTS NEIGHBORHOOD IMPROVEMENT DISTRICT #5

FINANCIAL STATEMENTS

FOR THE YEAR ENDED DECEMBER 31, 2022  
(Independent Auditor's Review Report Attached)

# HERITAGE HEIGHTS NEIGHBORHOOD IMPROVEMENT DISTRICT #5

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## INDEPENDENT AUDITOR'S REPORT

August 2, 2023

Board of Directors  
Neighborhood Improvement District (NID) #5  
Milwaukee, Wisconsin

### **Background:**

The Board of Directors for Heritage Subdivision engaged me (Juanita Banks) to perform agreed upon audit procedures on financial transactions processed during calendar year 2022 through the Heritage Heights NID #5 checking account. This is my sixth year performing the NID #5 agreed upon audit procedures. I am a retired audit and risk management executive with 30+ years of audit, compliance, and risk management experience. I hold a certification in each of these disciplines. My work history includes prior employment with Arthur Andersen, Brady Corporation, Northwestern Mutual, Protiviti, and American Transmission Company.

The City of Milwaukee has requested confirmation from the Heritage Board of Directors via an independent review that all transactions were appropriate (i.e., related to maintenance and upkeep of the Heritage Subdivision).

### **Agreed Upon Audit Procedures Completed:**

1. Confirmed ending and starting check numbers.
2. Confirmed the ending and starting bank balance between months, noting no exceptions.
3. Reviewed the NID #5 Procurement Policy for understanding.
4. Reviewed each check stub and supporting receipt for alignment with the Procurement Policy, Board objectives, and reasonableness of the expenditure, noting no exceptions.
5. Traced deposit(s) and withdrawal(s) to source documents, noting no exceptions.
6. Reviewed calendar year 2022 bank statements to confirm that transactions were entered in the general ledger (G/L), noting no exceptions.
7. Compared the year-end bank statement balance to the (G/L) year-end balance, noting no exceptions.

### **Conclusion:**

All substantial transactions processed during the calendar year 2022 were in alignment with the procurement policy and supported by receipts or commitments.

Sincerely,

*Juanita Banks*

Juanita Banks, Certified Public Accountant | Certified Internal Auditor | Certified Risk Manager  
[Banksjuanita9@gmail.com](mailto:Banksjuanita9@gmail.com)  
262.364.4010

# Heritage Heights NID 5

## Statement of Financial Position

As of December 31, 2022

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	\$45,367.54
<b>Total Current Assets</b>	<b>\$45,367.54</b>
<b>TOTAL ASSETS</b>	<b>\$45,367.54</b>
<b>LIABILITIES AND EQUITY</b>	
Total Liabilities	
Equity	\$45,367.54
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$45,367.54</b>

# Heritage Heights NID 5

## Statement of Activities

January - December 2022

	TOTAL
Income	
2021 Assessments	20,500.00
Uncategorized Income	100.00
<b>Total Income</b>	<b>\$20,600.00</b>
Total Revenue	\$20,600.00
Expenses	
Bank Charges & Fees	60.00
Insurance	670.00
Legal & Professional Services	7,970.40
Office Supplies & Software	341.60
Other Business Expenses	5.90
Reimbursable Expenses	769.84
Repairs & Maintenance	270.85
Uncategorized Expense	100.00
Utilities	241.41
<b>Total Expenses</b>	<b>\$10,430.00</b>
NET OPERATING INCOME	\$10,170.00
NET INCOME	\$10,170.00



NOTES TO THE FINANCIAL STATEMENTS  
DECEMBER 31, 2022

SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

**Organization**

Heritage Heights Neighborhood Improvement District #5's objective is to : Assist residents with storm water management, lawn appeal through various initiatives, code compliance, safety improvements, subdivision entrance appeal, and development of NID community building sponsored activities.

**Accounting Method**

The financial statements of the Organization have been prepared on the cash basis of accounting.

**Revenue**

Funds are received from the annual assessments allocated to residential and commercial properties within the NID.

**Expenses**

The organization pays expenses established in the operating plan. The balance of revenue to expenses is recorded against net income.



***Reinvent Where You Live Heritage Heights Your Destination  
Neighborhood***

**NID #5**

**ANNUAL REPORT (2024)**

**Mission Statement/Vision/Priorities**

To promote and sustain Heritage Heights NID#5 as a thriving and diverse neighborhood. By influencing the design of new homes and the remodeling of older homes in a way that preserves, enhances, and is inviting for others to want to live in the subdivision and excites the area sense of place for thriving nearby businesses.

- To ensure that the City of Milwaukee’s request for Water Efficiency Improvements including replacement of water laterals, old piping, low-flow fixtures, storm water maintenance including backyard swells, and other necessary repairs are completed.
- To enhance Lawn Appeal including our mailbox project, community lighting, and other lawn appeal projects.
- To ensure Code Compliance including all repairs necessary to remedy an existing code violation.
- To provide Safety Improvements including LED lighting, ditch repair, communication with the Milwaukee Police Department (District #4), neighborhood awareness, and other safety projects.
- Increase our Entrance Appeal including a new monument at the entrance and other aesthetic enhancements.
- Neighborhood Preservation.
  - Maintain deed restrictions and other visionary goals of the development.
  - Maintain structures and land in an aesthetically pleasing manor.
- Stabilization and Escalation of NID property values.
- Crime remediation and reduction.
  - Destination neighborhood vision.
  - Based on the concept of a **“gated community w/o walls”**.
- Celebration and Preservation of neighborhood diversity.
- Development of policies and procedures that allow for effective enforcement of deed restrictions and neighborhood covenants.



## NID #5

- Outreach to owners of rental properties to ensure that they and their tenants are aware and abide by neighborhood and aesthetic covenants.

### **Mission Statement/Vision/Priorities (continued)**

- Facilitate and ensure familiarity and collaboration between neighbors.
- Effective maintenance and five-year certification of our Storm Water Management Plan.
- Implementation of a Watershed project collaboration with the Sweet Water Organization.
- Method of Communication - Electronic file cabinet

### **Financial Relationships w/ other entities (CDCs, non-profits, associations)**

None Currently Identified

### **Total Assessed Value of Properties within Neighborhood**

Median Home Value \$389,900 (Realtor.com Market Overview 2023) \$30,000.00 increase/2022

### **Core Programs**

- Common Area Grass/foilage Maintenance
- Subdivision Storm Water Maintenance
- Monument Utility Cost and Maintenance
- Public/Community Initiatives
- Holiday/Community Events
- Mailbox Repair/Replacement Program
- Light-pole Repair/Replacement Program
- Security programs
- NID Administrative Cost
- Organization Bylaws Regulation Enforcement **Economic Development**
- NID/GHNA Enhancement Projects
- Secure Water Management Grants **Marketing & Branding**



## NID #5

- Recognition (Awards, newspaper/TV mentions)
- Resident Grants Programs
  
- **NID Facebook Page & Website Link with GHNA Neighborhood Association**
- **Neighbor to Neighbor Advocacy**
- **Community Electronic file cabinet**
- **Community Newsletter**

### Core Events

- Neighborhood Engagement Opportunities
- Neighborhood Clean-up
- Neighborhood Needs/Feedback Survey
- New Resident Meet & Great Social
- Neighborhood Events Calendar
- NID #5 Destination Neighborhood

### Partner/Collaborative Initiatives

- Partnership with neighbors, elected officials, businesses, and other community focused organizations to maximize benefit and services based on tax valuations and payments.
- Encourage community service. (Working for and with neighbors to improve this neighborhood).
- Partnering with Churches, Schools, and the Car Dealership to make our neighborhood a uniquely distinct community.
- Work closely with the Granville Heights Neighborhood Association (GHNA) to promote living, working, and visiting the NID #5.

### New Programs/New Committees Formed

- Neighborhood Ambassadors
- Communication Link



*Heritage Heights*

## NID #5

- Resident Involvement
- Community Calendar
- Strategic Planning
- Neighborhood Stabilization/Property Escalation
- Partnership (Neighbors, Elected Officials, Businesses, etc.)
- Community Service/Participation
- Water Management Advisory
- Survey/Feedback