

VILLARD AVENUE
BUSINESS IMPROVEMENT DISTRICT #19
2003 OPERATING PLAN

**By: The Villard Avenue BID Board, the Villard Avenue Business Association
And the Northwest Side Community Development Corporation
For: The City of Milwaukee and
The Villard Avenue Property Owners**

August 23, 2002

WEST VILLARD AVENUE BUSINESS IMPROVEMENT DISTRICT #19 2003 OPERATING PLAN

I. INTRODUCTION

In 1984, the Wisconsin Legislature created Sec. 66.608 of the Statutes enabling cities to establish Business Improvement Districts (BIDS) upon the petition of at least one property owner within the proposed district. The purpose of the law is "...to allow businesses within those districts to develop, manage and promote the districts and to establish an assessment method to fund these activities." Upon petition from property owners within the West Villard Avenue business district, the Common Council of the City of Milwaukee on September 23, 1997, by Resolution File Number 9707778 created BID No. 19 (West Villard Avenue) and adopted its initial operating plan.

Section 66.608 (3) (b), Wis. Stats. requires that a BID Board "shall annually consider and make changes to the operation plan ... The board shall then submit the operating plan to the local legislative body for approval." The Board of BID No. 19 (West Villard Avenue) submits this 2003 BID Operating Plan in fulfillment of the statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial July 1997 Operating Plan. Therefore, it incorporates by reference the earlier plan as adopted by the Common Council. In the interest of brevity, this plan emphasizes the elements which are required by Sec. 66.609, Wis. Stats. and the proposed changes for 2003. This plan does not repeat the background information, which is contained in the initial operating plan.

II. RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN AND ORDERLY DEVELOPMENT OF THE CITY

No changes in the District planning or zoning have occurred since adoption of the initial operating plan.

III. DISTRICT BOUNDARIES

Boundaries of the district, as shown on the map in Appendix A of this plan, are Villard Avenue from 29th Street on the East to 42nd Street on the West, 35th Street one half block on the South continuing Northeast until Rohr Avenue.

IV. PROPOSED OPERATING PLAN

A. Plan Objectives

The BID will be used to finance the business property owners' share of the cost of streetscape improvements. The objectives of this streetscaping project are as follows:

1. To improve the overall appearance and image of the street.
2. To enhance safety and security of the District.
3. To attract new businesses and increase private investment in the district.
4. To create an environment which will attract new customers and increase shopping in the area.

B. Proposed Activities

Principal activities to be undertaken by the BID during 2003 will include, but are not limited to the following:

1. *To improve the overall appearance and image of the street by:*
 - a. Encouraging design-sensitive renovations of the building within the District; Implementing design standards set forth by Quorum Architects, Inc.
 - b. Providing maintenance and management of the streetscape improvements;
 - c. Create and implement an identifying theme for the District's marketing and promotion program developed by Ad-Link Inc.
2. *To enhance the safety and security of the District by:*
 - a. Encouraging and supporting Safety Programs in the District including police protection;
 - b. Working with owners of vacant properties that are a nuisance;
3. *To attract new businesses and increase private investment in the district by:*
 - a. Promoting private and public financing of District development activities;
 - b. Generating business recruitment leads and facilitating development within the BID in order to gain new businesses;
 - c. Creating and maintaining a Villard Avenue presence on the web with links to business resources; Using Federal resources through the Technology Opportunity Program to wire area businesses;
 - d. Developing a tool to identify properties to be targeted for renovation or redevelopment;
 - e. Identifying investors for Villard Square Development;
4. *To create an environment which will attract new customers and increase shopping in the area by:*
 - a. Maintaining communication with the property owners and businesses operators in the district regarding the design and implementation of BID activities.
 - b. Developing a marketing plan which includes strategies, media coverage, promotional materials and special events for district to increase customer traffic;
 - c. Providing information regarding business, site preparation and selection, and rehabilitation resources in order to strengthen existing and new businesses, and to improve the appearance of the businesses.
 - d. Creating a three-year strategic plan for the district.

C. Principal Expenses

The principal expense of the district in 2003 shall be used to fund a marketing and design standardization program on Villard Avenue. The BID will contract with Northwest Side Community Development Corporation to manage proposed activities for the BID.

D. Payments

The loan amount after design changes approved by the BID was \$237,500.00, this is \$11,000 more than originally estimated. As a result the annual payment for years 2 through 15 are

\$ 25,387.34. This payment maintains the original interest rate, and makes up for the “undersized” initial payment. Payments are to be made in January of each year.

E. Financing Method

The proposed expenditures will be financed from funds collected from the BID assessments. The estimated assessed value of BID-eligible properties within the District is \$11,993,550.00.

The BID Board will have the authority and responsibility to prioritize expenditures and to revise the district budget as necessary to match the funds actually available. Any funds unspent at the end of 2003 shall be carried over to 2004 and applied against future expenses.

V. METHOD OF ASSESSMENT

A. Assessment Rate and Method

As of August 15 2002, the property in the proposed district has a total estimated assessed value of over \$12.7 million. Parcels are assessed by the BID in proportion to each parcel's part of the total assessed value in the district. For example, 3526 West Villard Avenue is 0.30% (\$265) of the total annual BID assessment of \$88,435.

B. Excluded and Exempt Property

The state BID law requires explicit consideration of certain classes of property. In compliance with the law, the following statements are provided:

1. Sec. 66.608 (1) (f): “The district may contain property used exclusively for manufacturing purposes, as well as properties used in part of manufacturing. These properties will be assessed according to the method set forth in this plan because it is assumed that they will benefit from development in the district.”
2. Sec. 66.608 (5) (a): “Property known to be used exclusively for residential purposes will not be assessed. Such properties are identified as BID Exempt Properties in Appendix B, as revised each year.”

In accordance with the interpretation of the City Attorney regarding Sec. 66.608 (1) (b), Wis. Stats. property exempt from general real estate taxes has been excluded from the district. Privately owned tax exempted property which is expected to benefit from district activities may be asked to make a financial contribution on a voluntary basis.

C. Remediation Payments

If for any reason a property within the BID is assessed in error. The BID Board approves of the following activities to repay BID tax funds;

1. Remit funds to property owners and /or the City of Milwaukee.
2. Remove and correct erroneous BID assessment from tax bill and relive property owner of any accrued penalties.
3. Return BID funds to the City Treasurers Office.

VI. CITY ROLE IN DISTRICT OPERATION

The City of Milwaukee has committed to helping private property owners in the district promote its development. To this end, the City has played a significant role in the creation of the BID and in the implementation of its operating plan. In particular, the City will continue to:

- A. Provide technical assistance to the proponents of the district through adoption of the operating plan and provide assistance as appropriate thereafter.
- B. Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.
- C. Collect BID assessments; maintain the BID assessments in a segregated account; and disburse the BID assessments to the district.
- D. Receive annual audits as required per Sec. 66.608 (3) of the BID law.
- E. On or before June 1st of each plan year, provide the Board, through the Tax Commissioner's Office, with the official City records on the assessed value of each tax key number within the district as of January 1st of each plan year for the purpose of calculating the BID assessments.
- F. Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.

VII. BUSINESS IMPROVEMENT DISTRICT NO. 19 BOARD OF DIRECTORS

The Board's primary responsibility will be implementation of this operating plan. The current BID No. 19 Board of Directors is comprised as follows:

- Tom Dienhart, Chairman
Property Owner, Business Owner of Marine Land Pet Store
- Bruce Sutherland, Vice Chairman
Property owner, Business owner, Storck Ace Hardware
- Arlis Jones, Secretary
Property Owner, Business Owner of ARJ's
- Peggy Mier, Treasurer
Bank Branch Manager, Wells Fargo
- Clarence Wade, Board Member
Property owner, Business owner, Pap's Restaurant
- Ben Kern, Board Member
Property Owner, Business Owner of Community Fitness Center
- Audrey Sellers, Board Member
Bank Branch Manager, US Bank

VIII. VILLARD AVENUE BUSINESS ASSOCIATION

The BID shall be a separate entity from the Villard Avenue Business Association 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 meeting law and not subject to the public records law except for its records generated in connection with the BID Board. In accordance with this plan, the Association may contract with the BID to provide services to the BID.

IX. FUTURE YEARS' OPERATING PLANS

It is anticipated that the BID 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 operating plan.

Section 66.608 (3) (a) of the BID law requires the BID Board and the City to annually review and make changes as appropriate in the operating plan. Therefore, while this documents outlines in general terms the complete development project, it focuses upon 2003 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2002 conditions. Greater detail about subsequent years' activities will be provided in the required annual plan updates. Approval by the Common Council of such operating plan updates shall be conclusive evidence of compliance with this operating plan and the BID law. In later years, the BID operating plan will continue to apply the assessment formula, as adjusted, to raise funds to meet the next annual budget. The method of assessing shall not be materially altered, except with the consent of the City of Milwaukee.

X. AMENDMENT, SEVERABILITY, AND EXPANSION

The BID has been created under the authority of Section 66.608 of the Statutes of the State of Wisconsin. Should any court find any portion of this statute invalid or unconstitutional As decision will not invalidate or terminate the BID and this BID operating plan shall be amended to conform to the law without need of re-establishment. Should the legislature amend the statute to narrow or broaden the process of a BID so as to exclude or include as assessable properties of certain class or classes of properties, then this BID operating plan may be amended by the Common Council of the City of Milwaukee as and when it conducts its annual review and approval of the operating plan and without necessity to undertake any other act. This is specifically authorized under Sec. 66.608 (3) (b), Wis. Stats.

As an appointed member of the Villard Avenue Business Improvement District #19 Board, I hereby approve the Year 2003 Operating Plan as written above.

BOARD SIGNATURES:

DATE:



Tom Dienhart, Chairman

Property Owner, Business Owner of Marine Land Pet Store

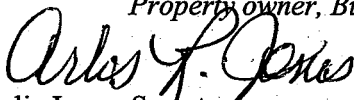
8-27-02



Bruce Sutherland, Vice Chairman

Property owner, Business owner, Storck Ace Hardware

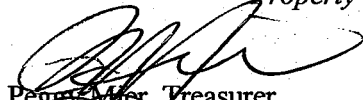
8-27-02



Arlis Jones, Secretary

Property Owner, Business Owner of ARJ's

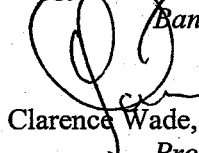
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Peggy Miller, Treasurer

Bank Branch Manager, Wells Fargo

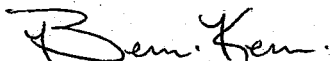
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Clarence Wade, Board Member

Property owner, Business owner, Pap's Restaurant

8/27/02



Ben Kern, Board Member

Property Owner, Business Owner of Community Fitness Center

8-27-02



Audrey Sellers, Board Member

Bank Branch Manager, US Bank

8/27/02

Appendix A

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DRAFT

Villard Avenue BID#19			
Proposed Expenditures for 2003			
ADMINISTRATIVE SERVICES			
Debt Service			
Loan Repayment-Principal and Interest			\$24,100
Contract Services			
Staff Support			\$20,000
Accounting Services			
2002 Audit			\$3,500
Continuency Fund			
Villard Events			\$1,500
General Expenses			
Postage & Copies			\$800
Utilities			\$500
Landscaping			\$4,000
PROGRAM ACTIVITIES			
Marketing/Advertising			
Ad-Link Inc.			\$20,100
Architectural Services			
Quorum Architects			\$3,000
Business Recruitment & Retention			
Early Action Grant Fund			\$4,000
Street Upkeep			\$6,935
TOTAL			\$88,435

TAX KEY CK AMOUNT

1	1920311000	9	200.59 9V
2	1920312000	4	401.18 9V
3	1920313000	X	235.89 9V
4	1920314000	5	288.85 9V
5	1920315000	0	481.41 9V
6	1920316100	2	263.17 9V
7	1920318100	3	159.67 9V
8	1920331000	8	312.12 9V
9	1920334000	4	112.33 9V
10	1920335000	X	1,347.95 9V
11	1920336000	5	873.76 9V
12	1920337000	0	231.08 9V
13	1920338000	6	512.70 9V
14	1920339000	1	515.91 9V
15	1920340000	7	262.37 9V
16	1920341000	2	198.98 9V
17	1920342000	8	188.55 9V
18	1920343000	3	278.42 9V
19	1920344000	9	312.12 9V
20	1920345000	4	252.74 9V
21	1920346000	X	406.79 9V
22	1920372000	1	424.44 9V
23	1920373100	3	467.77 9V
24	1920376000	3	314.52 9V
25	1920377000	9	320.14 9V
26	1920378000	4	471.78 9V
27	1920379000	X	320.94 9V
28	1920383000	1	219.04 9V
29	1920384000	7	280.82 9V
30	1920385000	2	259.96 9V
31	1920386000	8	519.92 9V
32	1920392000	0	68.20 9V
33	1920411110	6	1,099.22 9V
34	1920748110	9	8,087.72 9V
35	1920829000	5	803.16 9V
36	1920830000	0	293.66 9V
37	1920831000	6	425.25 9V
38	1920832000	1	316.93 9V
39	1920833000	7	200.59 9V
40	1920834000	2	103.50 9V
41	1920835000	8	537.58 9V
42	1920836100	X	588.13 9V
43	1920838000	4	358.65 9V
44	1920839000	X	220.65 9V
45	1920840000	5	253.54 9V
46	1920841100	7	235.89 9V
47	1920842000	6	45.73 9V
48	1920845100	9	666.76 9V

49	1920847100	X	227.07 9V
50	1920848100	5	3,450.12 9V
51	1920852000	0	842.47 9V
52	1920853000	6	1,893.55 9V
53	1920901100	2	1,172.24 9V
54	1920903000	7	280.02 9V
55	1920904000	2	353.84 9V
56	1920905000	8	332.98 9V
57	1929982000	1	441.29 9V
58	1929983000	7	322.55 9V
59	1929984000	2	259.96 9V
60	1929985000	8	304.89 9V
61	1929986100	X	1,331.91 9V
62	1930422000	X	768.65 9V
63	1930424000	0	496.66 9V
64	1930501110	2	9,194.17 9V
65	1930511000	3	1,899.17 9V
66	1930705100	4	15,854.50 9V
67	1930909000	7	267.99 9V
68	1930910100	9	194.97 9V
69	1930912000	3	290.45 9V
70	1930913110	2	1,107.25 9V
71	2070004110	8	20.86 9V
72	2070004210	4	252.74 9V
73	2070005111	1	255.15 9V
74	2070007110	4	5,650.97 9V
75	2070020000	1	2,158.33 9V
76	2079997000	8	3,081.04 9V
77	2079998000	3	395.56 9V
78	2080001000	5	355.44 9V
79	2080002100	7	172.51 9V
80	2080006000	2	536.77 9V
81	2080014100	2	1,107.25 9V
82	2080015000	1	111.53 9V
83	2080017000	2	339.40 9V
84	2080018100	4	336.99 9V
85	2080021000	4	353.84 9V
86	2080101000	9	2,245.79 9V
87	2080863000	2	213.43 9V
88	2081301100	0	449.32 9V
89	2081304100	7	481.41 9V
90	2081332000	3	730.14 9V
91	2081441000	6	2,158.33 9V

88,234.00

88,234.00