

WEST NORTH AVENUE  
BUSINESS IMPROVEMENT DISTRICT NO. 16  
2007 OPERATING PLAN

August 22, 2006

## TABLE OF CONTENTS

I.	INTRODUCTION	page 3
II.	RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN AND ORDERLY DEVELOPMENT OF THE CITY	page 3
III.	DISTRICT BOUNDARIES	page 4
IV.	PROPOSED OPERATING PLAN	page 4
	a. Plan Objectives	
	b. Proposed Activities	
	c. Proposed Expenditures	
	d. Financing Method	
V.	METHOD OF ASSESSMENT	page 7
	a. Assessment Rate and Method	
	b. Excluded and Exempt Property	
VI.	CITY ROLE IN DISTRICT OPERATION	page 9
VII.	BOARD OF DIRECTORS	page 11
VIII.	MILWAUKEE WEST NORTH AVENUE BUSINESS ASSOCIATION	page 10
IX.	FUTURE YEARS' OPERATING PLANS	page 11
X.	AMENDMENT, SEVERABILITY, AND EXPANSION	page 11

Appendix G – 2007 Assessed Values and BID No. 16 Assessments

# WEST NORTH AVENUE BUSINESS IMPROVEMENT DISTRICT 2007 OPERATING PLAN

## I. INTRODUCTION

In 1984, the Wisconsin legislature created Sec. 66.608 of the Statutes enabling cities to establish Business Improvement District (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 North Avenue business district, the Common Council of the City of Milwaukee on September 27, 1995, by Resolution File Number 95078 created BID No. 16 (West Northern 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 operating plan . . . The board shall then submit the operating plan to the local legislative body for approval.” The Board of BID No. 16 (Uptown Crossing Business District) submits this 2006 BID Operating Plan in fulfillment of the statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial July 1995 BID 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. 66.608, Wis. Stats., and the proposed changes for 2006. 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 are West North Avenue from Sherman Boulevard westbound to North 60<sup>th</sup> Street and West Lisbon Avenue North 45<sup>th</sup> Street Westbound to North 52<sup>nd</sup> Street. A listing of properties in the district is provided in Appendix A.

### 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. Improve the overall appearance and image of the street.
2. Enhance safety and security by increasing the amount of pedestrian level lighting.
3. Attract new businesses and increase private investment in the district.
4. Create an environment which will attract new customers and increase economic viability in the area.

The streetscaping may include, but is not limited to, improvements such as; installation of pedestrian level "harp" lighting; replacing portions of the curb, gutter, and sidewalk; replacing portions of the sidewalk with paving

brick; planting of street trees; and installation of bollards, benches, and landscaping.

b. Proposed Activities

Principal activities to be undertaken by the BID during 2007 will include, but are not limited to:

1. Monitoring the continued installation and implementation of the streetscape improvements. Two Hundred Fifty Thousand Dollars (\$250,000) of additional major improvements, which was approved in 2002, are mostly completed and 'finishing touches' should be completed as they are determined and/or found. The additional expense is part of a contract BID No. 16 has with the City of Milwaukee.
2. Maintaining communication with the property owners and business operators in the district regarding the design and implementation of the project via quarterly newsletters to the district
3. Monitoring the ongoing maintenance of streetscape improvements.
4. Negotiating and entering into a landscape maintenance agreement to provide installation and ongoing maintenance of plants and street banners including four (4) seasonal changes.

5. Via involvement with other community resources, investigate avenues to facilitate economic development, opportunities, and activities including management of BID functions.
6. Via new lighting on existing artwork and submitting a "Request For Proposal" to local artists for new artwork in the main intersection of the BID, public artwork will become a focus of BID decorations and public enjoyment.

c. Proposed Expenditures

PROJECT BUDGET 2007

Project Expenses

Debt Expense* (paid to City of Milwaukee)	\$43,194
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Operating Expenses

Insurance	\$1,275
Ongoing Street Maintenance (may include, but is not limited to, replacement of damaged street amenities and street landscaping, graffiti removal, and landscaping maintenance.)	35,500
Seasonal Decorations	7,575
General Expenses	2,732
Professional Services	12,450
<u>Total Expenses</u>	<u>\$102,726</u>

\* The streetscaping project was initiated in September 1996. In 2007, we will continue to finalize the major project which was nearly finalized in 2006, which was to

a. Assessment Rate and Method

As of June 26, 2006 the properties in the district had a total assessable value of \$22,675,700. This plan proposes to assess the taxable property in the district at a rate of \$5.25 per \$1,000 of assessed value for the purposes of the BID. Appendix A shows the projected BID assessment for each property included in the district.

The principle behind the assessment methodology is that each property owner should contribute to the BID in proportion to the benefit derived from the BID. After consideration of assessment methods, it was determined that the assessed value of the property was the characteristic most directly related to the potential benefit provided by the BID.

The variables used to determine the regular BID assessments are:

1. The total assessed value of each tax key parcel within the district; and
2. The specific dollar amount per \$1,000 of the assessed value of each tax key parcel.

The assessment methodology is as follows: For each of the taxable tax key parcels within the BID boundaries, the BID assessment is calculated by applying a \$5.25 per \$1,000 charge against the assessed value of the parcel.

b. Excluded and Exempt Property

The 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) Im: The district may contain property used exclusively for manufacturing purposes, as well as properties used in part for 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 A, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding Sec. 66.608 (1) (b), Wis. States., property exempt from general real estate taxes have been excluded from the district. Privately owned tax exempt property, which is expected to benefit from district activities, may be asked to make a financial contribution on a voluntary basis.

## 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:

1. Provide technical assistance to the proponents of the district through adoption of the operating plan and provide assistance as appropriate thereafter.
2. Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.



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1. Provide technical assistance to the proponents of the district through adoption of the operating plan and provide assistance as appropriate thereafter.
2. Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.

3. Collect BID assessments, maintain the BID assessments in a segregated account, and disburse the BID assessments to the district.
4. Receive annual audits as required per Sec. 66.608 (3) (c) of the BID law.
5. On or before June 1<sup>st</sup> 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 1<sup>st</sup> of each plan year for the purposes of calculating the BID assessments.
6. Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.

## VII. BUSINESS IMPROVEMENT DISTRICT NO. 16 BOARD OF DIRECTORS

The Board's primary responsibility will be implementation of this operating plan. The current BID No. 16 Board of Directors is comprised as follows:

- Gordon Steimle  
Neighborhood resident, Washington Heights location
- Jill Trachte  
Property owner, business owner, North Avenue location
- Christine McRoberts  
Property owner, business owner, North Avenue location
- Allyson Nemecek  
Neighborhood resident, Westside of Milwaukee location

- Lora Pryor  
Branch manager of US Bank, North Avenue location
- Nathaniel Lynn  
Property owner, business owner, North Avenue location

#### VIII. MILWAUKEE WEST NORTH AVENUE BUSINESS ASSOCIATION

The BID shall be a separate entity from the Milwaukee West North 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 record law except for its records generated in connection with the BID to provide services to the BID. At present, the business association is not operating.

#### 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 document outlines in general terms the complete development project, it focuses upon 2007 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2006 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.

#### 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, its 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 a 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.

EXHIBIT G  
2007 BID #16 OPERATING PLAN

1 3280631000	\$150.68 9R
2 3280633000	\$781.73 9R
3 3280634000	\$244.13 9R
4 3280635000	\$873.08 9R
5 3281207000	\$643.13 9R
6 3281210000	\$427.88 9R
7 3281211000	\$456.75 9R
8 3281228000	\$561.75 9R
9 3281229000	\$761.25 9R
10 3281230000	\$1,380.75 9R
11 3281233000	\$792.75 9R
12 3281257000	\$438.90 9R
13 3281282000	\$454.13 9R
14 3281505100	\$2,556.75 9R
15 3281507000	\$1,454.25 9R
16 3281910110	\$1,643.25 9R
17 3281911100	\$66.15 9R
18 3282101100	\$4,289.78 9R
19 3282121000	\$582.75 9R
20 3289992110	\$6,699.00 9R
21 3290010000	\$2,357.25 9R
22 3290019110	\$4,425.75 9R
23 3290026000	\$614.25 9R
24 3290027000	\$3,664.50 9R
25 3290125110	\$3,153.15 9R
26 3290148000	\$3,013.50 9R
27 3290149000	\$777.00 9R
28 3290150000	\$2,689.05 9R
29 3290212000	\$3,213.00 9R
30 3290224000	\$1,449.00 9R
31 3290225000	\$1,438.50 9R
32 3290248000	\$1,433.25 9R
33 3290249110	\$1,942.50 9R
34 3290542000	\$214.20 9R
35 3290911100	\$3,147.38 9R
36 3291012000	\$2,567.78 9R
37 3291882000	\$67.20 9R
38 3299991100	\$897.75 9R
39 3460115000	\$1,186.50 9R
40 3460126100	\$1,086.75 9R
41 3460141000	\$317.10 9R
42 3460142100	\$347.03 9R
43 3460142200	\$402.68 9R
44 3460166000	\$1,160.25 9R
45 3460501000	\$279.83 9R
46 3460523000	\$533.93 9R
47 3461401000	\$1,370.25 9R
48 3461402000	\$656.25 9R
49 3461403000	\$1,008.00 9R
50 3461404000	\$1,653.75 9R
51 3461405000	\$876.75 9R
52 3461406000	\$1,291.50 9R

EXHIBIT G  
2007 BID #16 OPERATING PLAN

53 3461423000	\$939.75 9R
54 3461424000	\$687.75 9R
55 3461425000	\$1,265.25 9R
56 3461426000	\$507.68 9R
57 3461427000	\$714.00 9R
58 3461444000	\$561.75 9R
59 3461445000	\$1,344.00 9R
60 3461446000	\$1,097.25 9R
61 3461601100	\$981.75 9R
62 3461604000	\$480.38 9R
63 3461605000	\$703.50 9R
64 3461623000	\$640.50 9R
65 3461624000	\$511.88 9R
66 3461625000	\$417.38 9R
67 3469974000	\$468.83 9R
68 3470207000	\$1,249.50 9R
69 3470208000	\$395.33 9R
70 3470209100	\$1,984.50 9R
71 3470213000	\$285.60 9R
72 3470216000	\$420.00 9R
73 3470225100	\$3,304.88 9R
74 3470301000	\$379.58 9R
75 3470302000	\$561.75 9R
76 3470303000	\$520.80 9R
77 3470304000	\$987.00 9R
78 3470321000	\$80.85 9R
79 3470323121	\$1,706.25 9R
80 3470336000	\$1,330.88 9R
81 3470708000	\$5,502.00 9R
82 3470709000	\$509.78 9R
83 3470710000	\$385.35 9R
84 3470711000	\$1,039.50 9R
85 3470911000	\$25.73 9R
86 3470912000	\$274.05 9R
87 3470913000	\$263.55 9R
88 3471001100	\$3,018.75 9R
89 3471019000	\$453.08 9R
90 3471020000	\$1,202.25 9R
91 3471042000	\$466.73 9R
92 3471043000	\$868.88 9R
93 3471044000	\$787.50 9R
94 3479992000	\$656.25 9R
95 3479993100	\$359.10 9R

\$114,835.35

**BUSINESS IMPROVEMENT DISTRICT # 16**  
 Milwaukee, Wisconsin  
 2007 Operating Budget

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Total	2006 Actual	2005 Actual
<b>INCOME</b>															
4011 - Annual City Assessment	0	0	111,873	0	0	0	0	0	0	0	0	0	111,873	90,758	85,299
Annual City Assessment	0	0	111,873	0	0	0	0	0	0	0	0	0	111,873	90,758	85,299
<b>Total Rental Income</b>															
Sundry Income	12	12	12	12	12	12	12	12	12	12	12	12	144	81	331
4205 - Interest Income	12	12	12	12	12	12	12	12	12	12	12	12	144	81	331
<b>TOTAL GROSS INCOME</b>	\$12.00	\$12.00	\$111,885.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$112,017.00	\$90,839	\$85,630
<b>OPERATING EXPENSES</b>															
<b>Repairs &amp; Maintenance</b>															
5274 - Dumpster Repair/Replacement	0	0	0	0	0	500	0	0	0	500	0	0	1,000	0	10,007
5280 - Electrical Service	0	0	0	0	350	0	0	0	0	0	0	0	350	252	252
5425 - Weekly Maintenance	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	16,800	9,000	16,000
<b>Total Repairs &amp; Maintenance</b>	1,400	1,400	1,400	1,400	1,750	1,900	1,400	1,400	1,400	1,900	1,400	1,400	18,150	9,252	26,259
<b>Grounds</b>															
5457 - Holiday Decorations	0	0	0	1,225	0	0	0	0	0	0	0	2,750	3,975	2,500	5,025
5460 - Landscape	0	0	2,500	2,250	950	950	950	3,450	950	950	950	950	14,850	3,800	14,470
5470 - Pavement & Walk Repair	0	0	1,250	0	0	0	0	1,250	0	0	0	0	2,500	0	2,336
<b>Total Grounds</b>	0	0	3,750	3,475	950	950	950	4,700	950	950	950	3,700	21,325	6,300	21,831
<b>Administrative/Promotions</b>															
5696 - Copies / Printing	20	20	20	20	20	20	20	20	20	20	20	20	240	131	216
5725 - Management Fee	800	800	800	800	800	800	800	800	800	800	800	800	9,600	5,600	11,200
5740 - Postage	14	14	14	14	14	14	14	14	14	14	14	14	168	76	185
5750 - Telephone	2	2	2	2	2	2	2	2	2	2	2	2	24	9	13
5757 - Association Fee	0	0	0	0	0	100	0	0	0	0	0	0	100	0	100
5786 - Banners	0	600	0	0	1,200	0	0	0	0	0	600	0	3,600	2,400	8,726
5790/5800 - Advertising/Promotions	850	50	50	850	50	50	850	50	50	850	50	50	3,800	800	800
<b>Total Administrative/Promotions</b>	1,686	1,486	886	1,686	2,086	986	1,686	2,086	886	1,686	1,486	886	17,532	9,016	21,239
<b>Insurance / Accounting</b>															
5685 - Accounting	0	0	0	0	0	0	1,250	0	0	0	0	0	1,250	1,750	25
5839 - Insurance	0	0	1,275	0	0	0	0	0	0	0	0	0	1,275	1,275	1,275
<b>Total Insurance / Accounting</b>	0	0	1,275	0	0	0	1,250	0	0	0	0	0	2,525	3,025	1,300
<b>TOTAL OPERATING EXPENSES</b>	\$3,086.00	\$2,886.00	\$7,311.00	\$6,561.00	\$4,786.00	\$3,836.00	\$5,286.00	\$4,436.00	\$6,986.00	\$4,536.00	\$3,836.00	\$5,986.00	\$59,532.00	\$27,593.08	\$70,628.89
<b>NET OPERATING INCOME</b>	(\$3,074.00)	(\$2,874.00)	\$104,574.00	(\$6,549.00)	(\$4,774.00)	(\$3,824.00)	(\$5,274.00)	(\$4,424.00)	(\$6,974.00)	(\$4,524.00)	(\$3,824.00)	(\$5,974.00)	(\$52,485.00)	\$63,246.15	\$15,000.69
<b>Loan</b>															
5923 - City Loan Repayment	0	0	43,194	0	0	0	0	0	0	0	0	0	43,194	43,194	43,194
<b>Total Loan</b>	0	0	43,194	0	0	0	0	0	0	0	0	0	43,194	43,194	43,194
<b>NET CASH FLOW</b>													9,291	20,052	-28,193

Cell: A7  
Comment: ANNUAL CITY ASSESSMENT:

Cell: A8  
Comment: ANNUAL CITY ASSESSMENT: Based on 2006 Assessment from the City and calculated at a rate of \$5.25 per assessed \$1,000 and as detailed in the 2007 Operating Plan

Cell: A11  
Comment: SUNDRY INCOME:

Cell: A12  
Comment: INTEREST INCOME: Based on average interest income on the US Bank savings account earned in 2006

Cell: A18  
Comment: ONGOING STREET MAINTENANCE:

Cell: A19  
Comment: DUMPSTER REPAIR/REPLACEMENT: Budgeted \$1,000 for unforeseen repairs to dumpsters (new dumpsters purchased in 2005.)

Cell: A20  
Comment: ELECTRICAL SERVICE: Budgeted for unforeseen electrical repairs on lights for Stubben Art Work

Cell: A21  
Comment: WEEKLY MAINTENANCE: Current bid held with Sta Kleen for \$300 per week for street cleaning and minor maintenance/repairs. Budgeted an additional \$200 per week for unforeseen extra cleaning/maintenance/repairs/graffiti removal

Cell: A24  
Comment: SEASONAL DECORATIONS:

Cell: A25  
Comment: HOLIDAY DECORATIONS: Contract currently held by Stano Landscaping for holiday decorations (evergreen and mixed colored branches in seven concrete planters) and \$2,750 to Welke's for other holiday decorations

Cell: A26  
Comment: LANDSCAPE: Bid currently held by Stano Landscaping for \$7,600.00 per year (paid \$950/month May through December) for spring and fall clean ups, plantings, weeding, touchups, etc. \$2,250 also contracted for spring and summer plantings. Budgeted an additional \$5,000 for unforeseen expenses (tree grate clean up, damaged planters/bollards, etc.)

Cell: A27  
Comment: PAVEMENT & WALK REPAIR: Contingency amount budgeted based on historical numbers

Cell: A30  
Comment: GENERAL EXPENSES:

Cell: A31  
Comment: COPIES/PRINTING: Budget based on 2006 actual monthly charge backs from Ogden

Cell: A32  
Comment: MANAGEMENT FEE: \$800 per month per contract signed into effect October 19, 2004 and renews every 6 months. No increase anticipated and therefore none budgeted for.

Cell: A33  
Comment: POSTAGE: Budget based on 2006 actual monthly charge backs from Ogden includes quarterly newsletter mailings (approximately \$80 per mailing)

Cell: A34  
Comment: TELEPHONE: Budget based on 2006 actual monthly charge backs from Ogden for faxes and long distance charges

Cell: A35  
Comment: ASSOCIATION FEE: Budgeted \$100 for the BID Council annual membership fee

Cell: A36  
Comment: BANNERS: Contract currently held by Stano for 50% removal in winter and spring and full replacement in summer and fall

Cell: A37  
Comment: PROMOTIONS: Budgeted \$800 for the writing and publishing of the quarterly newsletter and \$50 per month for unforeseen expenses

Cell: A40  
Comment: INSURANCE:



Cell: A41

Comment: ACCOUNTING: Budgeted for annual audit by Ritz, Holman, Burala, Fire LLP

Cell: A42

Comment: INSURANCE: Two policies currently held with The Cincinnati Insurance Company via Robertson Ryan & Associates:

Policy # BCP862652 - Directors and Officers policy: \$750 premium per year for the period 2/18/05 - 2/18/08.

Policy # CAJ5831096 - General policy (includes street scape items.) \$525 premium per year for the period 3/1/05 - 3/1/08.

Cell: A49

Comment: LOAN:

Cell: A50

Comment: CITY LOAN REPAYMENT: Loan held with the City of Milwaukee - payable by March 31, 2007 (after BID assessment is received)