



**Heritage Heights NID #5**

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

**NEIGHBORHOOD IMPROVEMENT DISTRICT NO. 5**

**HERITAGE  
HEIGHTS**

**2023  
OPERATING PLAN**

September, 2022

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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 \$108,685,160.

## 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 – 2023

Principle activities that will be engaged in/continued by the NID during the 2023 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) Enhancement of our Adopt a Block program to reinforce neighborhood stability.
- k) Implement an **Alert Neighbor Program** (Ring System) that emphasizes community involvement in addressing crime and safety concerns in Milwaukee neighborhoods

C. Expenditures – 2023

2022 Budget

INCOME: \$20,300

Storm Water Management	\$6,000
Taxes and maintenance of monument land	\$3,000
GHNA Annual Grant	\$1,500
Pond Walking Path Development	\$3,000
Property Improvement Grants	\$2,500
Administrative expenses	\$2,300
Community building activities	\$1,000
Reserves/misc.	\$1,000
<b>Total</b>	<b>\$20,300</b>

D. Financing Method

The 2023 \$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:** R. Roberts
- **Treasure:** T. Finkley
- **Secretary:** E. Roberson
- **Director:** A. Chapman
- **Director:** J. Ferguson
- **Director:** M. McClain
- **Director:** D. McKay
- **Director:** L. Thompson
- **Advisory GHNA:** S. Smith
- **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 ASSESMENT

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 2023.

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, 2022, the property in NID #5 had a total assessed value of over \$108 million dollars.

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

V. 2023 OPERATING PLAN

A. Phased Development

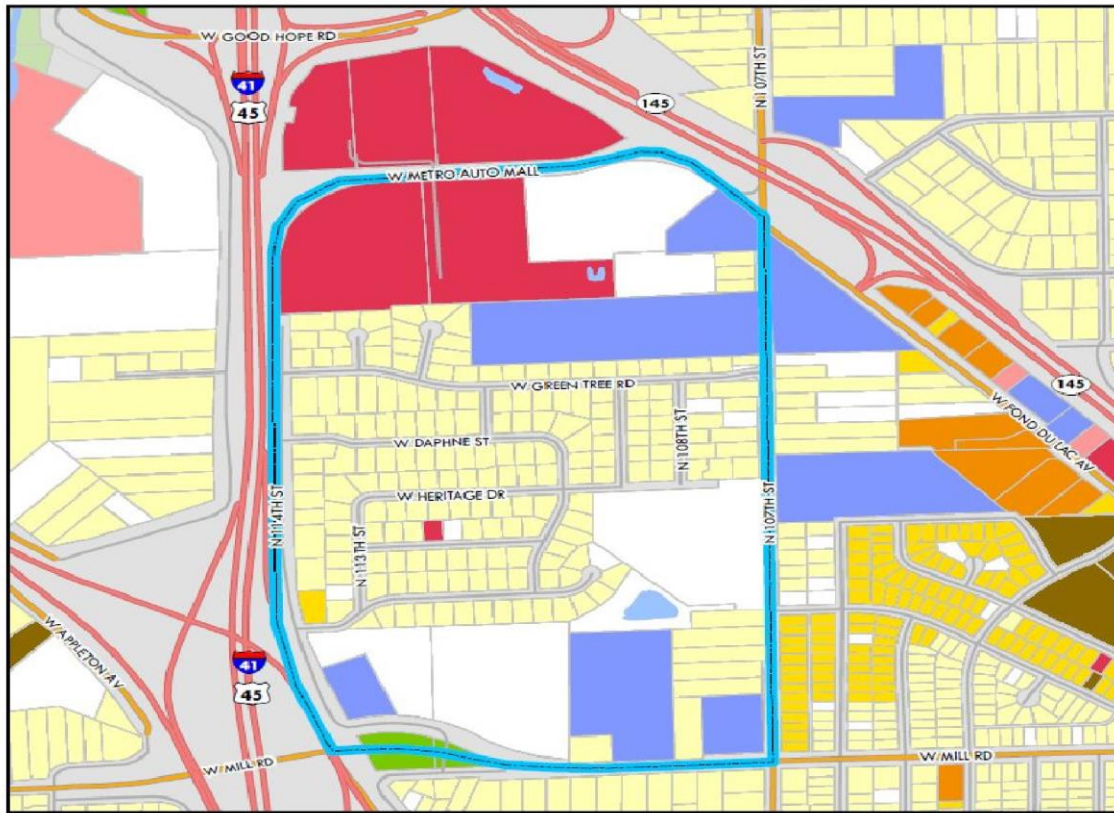
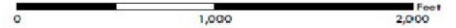
NID #5 will continue to revise and develop the Operating Plan annually, in response to changing development needs and opportunities in the district, in accordance with the purposes and objectives defined in this initial Operating Plan.

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

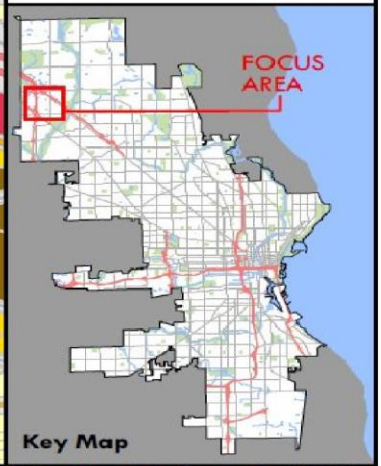


**Legend**

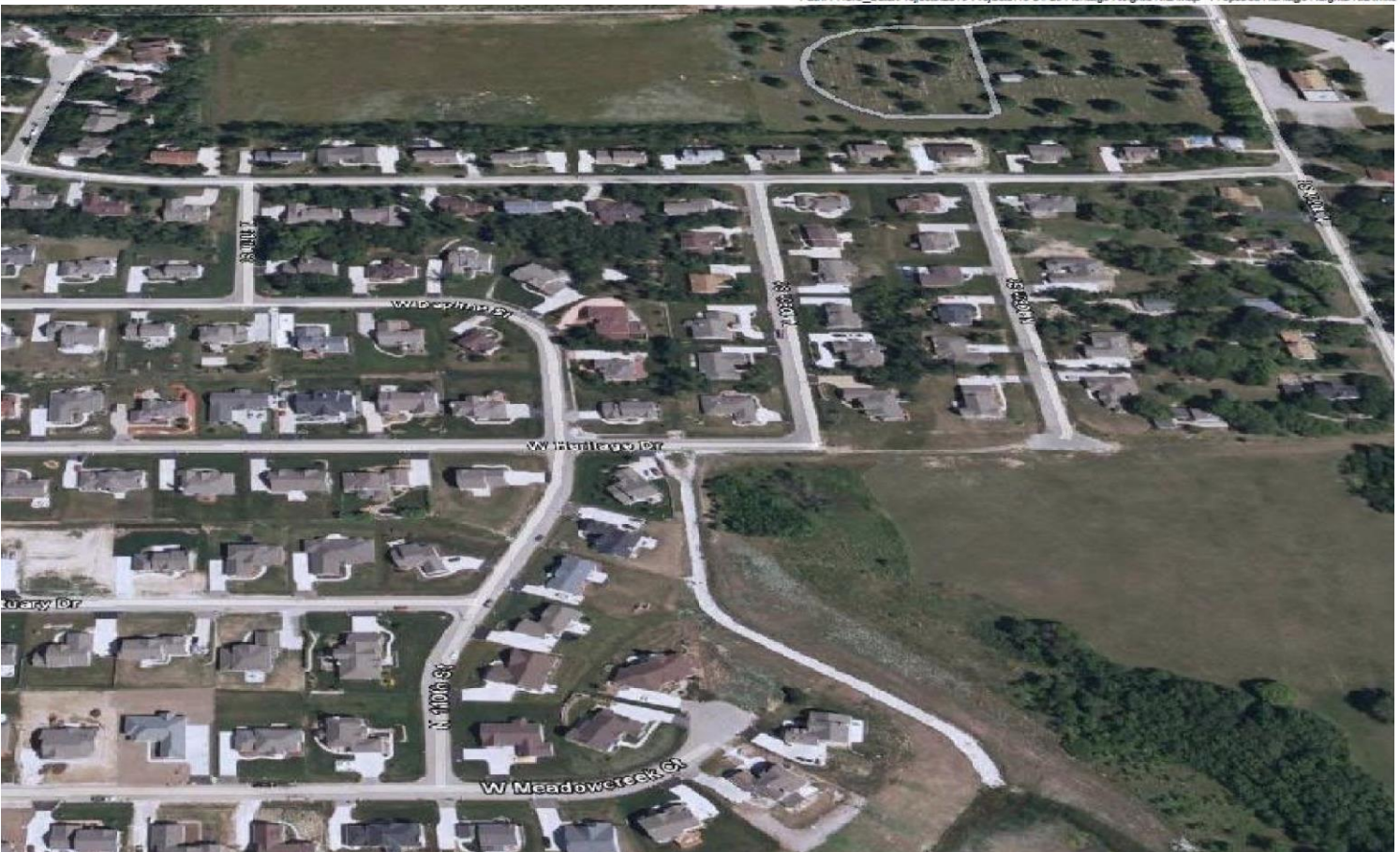
- Proposed NID Boundary
- Parcel Boundary

**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. GHNA Subdivision Entrance      | 10722 W. Green Tree Rd    |
| 5. Salem Evangelical Lutheran     | 11123 W. Green Tree Rd    |
| 6. Salem Evangelical Lutheran     | 11034 W. Green Tree Ave   |
| 7. City of Milwaukee              | 10915-R W. Meadowcreek Dr |
| 8. New Restoration Church         | 11248 West Mill Rd        |
| 9. Heritage Heights SWM Pond      | 10705 W. Green Tree       |
| 10. St Mark AME Church            | 6626 N. 114 Street        |
| 11. Wisconsin Corp OF Seventh Day | 10900 W. Mill Rd          |
| 12. City of Milwaukee School      | 6577 N. 107               |

Taxkey	Address	Owner1	Class	NID 5 Assessment
1460322000	11224 W MILL RD	NEW RESTORATION CHRISTIAN	Local Commercial	200
1140121000	11330 W GREEN TREE RD	ERICA HARRIS-DAY	Residential	100
1140122000	11320 W GREEN TREE RD	DEMETRIUS DAVIS	Residential	100
1140131000	6840 N 114TH ST	ERIC R MOERCHEN	Residential	100
1140141000	6826 N COVENTRY CT	STARLETTE M PATTERSON	Residential	100
1140142000	6836 N COVENTRY CT	KELLY LEWIS	Residential	100
1140143000	6835 N COVENTRY CT	MICHAEL ROSS	Residential	100
1140144000	6825 N COVENTRY CT	GLADYS I MANZANET	Residential	100
1140145000	6811 N COVENTRY CT	LOUIS JOHNSON JR	Residential	100
1140146000	6820 N 114TH ST	PRESLEY CARLYLE	Residential	100
1140191000	6885 N 107TH ST	FREDDIE KEITH	Residential	100
1140192000	6875 N 107TH ST	JOSHUA J BAUER	Residential	100
1140193000	6865 N 107TH ST	TRESSA D BROWN	Residential	100
1149972110	11308 W GREEN TREE RD	THOMAS M & GAYLA K BOEHLKE	Residential	100
1460001000	11230 W DAPHNE ST	ROOSEVELT HOPSON	Residential	100
1460002000	11210 W DAPHNE ST	JOEL MC DADE	Residential	100
1460003000	11140 W DAPHNE ST	RONALD W ROBERTS	Residential	100
1460012000	10800 W MILL RD	ROMAN J ALBRECHT	Residential	100
1460021100	6768 N 114TH ST	ANDREW S WARD I	Residential	100
1460032100	10920 W MILL RD	JONATHAN D DAVIS	Residential	100
1460041000	6475 N 107TH ST	EDWARD E MELLER	Residential	100
1460042000	6459 N 107TH ST	RAVINDRA K TALWALKER &	Residential	100
1460061100	11313 W GREEN TREE RD	RONALD FERRILL	Residential	100
1460062100	11301 W GREEN TREE RD	BRIAN BERNHARDT	Residential	100
1460071000	11313 W DAPHNE ST	WAYNE L SIMMONS	Residential	100
1460072000	11303 W DAPHNE ST	SAMMY JONES JR	Residential	100
1460081100	11235 W GREEN TREE RD	STEVIE B SUMMERS	Residential	100
1460082100	11221 W GREEN TREE RD	LUANN WEIK	Residential	100
1460083000	11209 W GREEN TREE RD	ADRIUN DAVIS IRREVOCABLE	Residential	100
1460084000	11137 W GREEN TREE RD	DAVID C WEST	Residential	100
1460086000	11107 W GREEN TREE RD	NICOLE TANNER	Residential	100
1460087000	10722 W GREEN TREE RD	MELISSA M THEISEN	Residential	100
1460088000	10740 W GREEN TREE RD	CONWAY NIMMER JR	Residential	100
1460089000	10800 W GREEN TREE RD	SAUD AHMED	Residential	100
1460090000	10814 W GREEN TREE RD	CLIFFORD E THOMPSON	Residential	100
1460091000	10830 W GREEN TREE RD	COREY L COLEMAN	Residential	100
1460092000	10904 W GREEN TREE RD	DAVID G NABORS	Residential	100
1460093000	10920 W GREEN TREE RD	VICTOR CAMPBELL	Residential	100
1460094000	10936 W GREEN TREE RD	DUANE TURMAN SR	Residential	100
1460095000	11008 W GREEN TREE RD	ANTHONY G BERENDT	Residential	100
1460096000	11022 W GREEN TREE RD	SUSAN E STUERMER	Residential	100
1460098000	10706 W GREEN TREE RD	MELISSA M THEISEN	Residential	0
1460099000	11033 W GREEN TREE RD	KARINA BRANCO KIEFFER	Residential	100
1460100000	11019 W GREEN TREE RD	BOSSMAN K OWUSU AYIM	Residential	100
1460101000	11007 W GREEN TREE RD	FREDDY LEWIS JR	Residential	100
1460102000	10935 W GREEN TREE RD	MARION L REITER TOD	Residential	100
1460103000	10921 W GREEN TREE RD	THE SAMUEL M AND ALMA J LEATHERW	Residential	100
1460104000	10905 W GREEN TREE RD	BRUCE D RICHARDS	Residential	100
1460105000	10823 W GREEN TREE RD	RONALD K BROWN	Residential	100
1460106000	10807 W GREEN TREE RD	JOSEPH T WILLIAMS JR	Residential	100
1460107000	10741 W GREEN TREE RD	NATHAN SHORTER	Residential	100
1460108000	10705 W GREEN TREE RD	HERITAGE MEADOWS STORMWATER	Residential	0
1460111000	6761 N 109TH ST	CURTISS E HARRIS	Residential	100
1460112000	6749 N 109TH ST	CHRIS J VERHAALEN	Residential	100
1460113000	6735 N 109TH ST	ALONZO G CHAPMAN	Residential	100
1460114000	6721 N 109TH ST	DUANE H SWANK	Residential	100
1460115000	6718 N 110TH ST	PAMELA HUTCHINS	Residential	100
1460116000	6732 N 110TH ST	LONDON THOMAS	Residential	100
1460117000	11000 W DAPHNE ST	DEBBIE MCKAY	Residential	100
1460118000	11004 W DAPHNE ST	MELVIN FINKLEY	Residential	100

1460119000	11016 W DAPHNE ST	RODERICK L ROBERSON	Residential	100
1460120000	11028 W DAPHNE ST	WALTER SMITH	Residential	100
1460121000	11124 W DAPHNE ST	JOSEPH JEFFERSON	Residential	100
1460122000	11039 W DAPHNE ST	KEVIN NEALE	Residential	100
1460123000	11027 W DAPHNE ST	BETTY SUE & JIMMY CROCKETT	Residential	100
1460124000	11015 W DAPHNE ST	RAYMOND E BANKS	Residential	100
1460125000	11001 W DAPHNE ST	MICHAEL G GEORGE	Residential	100
1460131000	11227 W DAPHNE ST	JANARDHANAN E CHERIYALANTHOT	Residential	100
1460132000	11211 W DAPHNE ST	JAMES R EWING	Residential	100
1460133000	11139 W DAPHNE ST	ODELL R MINOR	Residential	100
1460134000	11127 W DAPHNE ST	NICOLE J DAVILA	Residential	100
1460142000	11110 W GREEN TREE RD	MARY COLLA	Residential	100
1460143000	6810 N 112TH CT	CHARTEISHA CARSON-CLARK	Residential	100
1460144000	6820 N 112TH CT	ARTHUR JONES	Residential	100
1460145000	6836 N 112TH CT	ALLEN N PERRY	Residential	100
1460146000	6846 N 112TH CT	JEFFREY B NORMAN	Residential	100
1460147000	6856 N 112TH CT	BRYAN K WILLIAMS	Residential	100
1460148000	6845 N 112TH CT	GARFIELD A PLUNKETT	Residential	100
1460149000	6835 N 112TH CT	DARRYL WINSTON	Residential	100
1460150000	6825 N 112TH CT	REGINALD D ADAMS	Residential	100
1460151000	11210 W GREEN TREE RD	REGINA L YOUNG	Residential	100
1460161000	6679 N 107TH ST	MARK WEBER	Residential	100
1460171000	6705 N 107TH ST	DARRYL JOZEFczyk	Residential	100
1460172000	6724 N 108TH ST	ALEXANDER JOHNSON, SR.	Residential	100
1460173000	6725 N 108TH ST	GWENDOLYN D AND DUANE A JR MOSS	Residential	100
1460174000	6722 N 109TH ST	MARK WADE	Residential	100
1460181000	6764 N 109TH ST	JOHNNIE W SMITH II	Residential	100
1460182000	6765 N 108TH ST	THOMAS L DAVIS	Residential	100
1460183000	6752 N 109TH ST	SAMUEL CHAMONG YANG	Residential	100
1460184000	6745 N 108TH ST	TIMOTHEUS PARIS JR	Residential	100
1460185000	6740 N 109TH ST	CARMEN D BURTIN	Residential	100
1460186000	6733 N 108TH ST	RANDOLPH FULFER TOD	Residential	100
1460187000	6756 N 108TH ST	NENG YANG	Residential	100
1460188000	6725 N 107TH ST	TIMOTHY J KUBIK	Residential	100
1460189000	6742 N 108TH ST	ANDRE CHAPMAN	Residential	100
1460190000	6721 N 107TH ST	JOSE ALBERTO BARAJAS	Residential	100
1460191000	6728 N 108TH ST	LAEL J THOMPSON SR	Residential	100
1460192000	6715 N 107TH ST	GRANT A KARI	Residential	100
1460201000	6705 N 108TH ST	SYLVESTER GRANT	Residential	100
1460202000	6700 N 109TH ST	ROBERT A BREDENDICK TOD	Residential	100
1460203000	10908 W HERITAGE DR	DEBORAH N KUETHER	Residential	100
1460204000	10932 W HERITAGE DR	GABRIEL KLETT-KIMBLE	Residential	100
1460211000	11010 W HERITAGE DR	PHELON THADISON	Residential	100
1460212000	11018 W HERITAGE DR	KAREN L PAYNE	Residential	100
1460213000	11030 W HERITAGE DR	MARK WADE	Residential	100
1460214000	11038 W HERITAGE DR	TRAVIS BROWN SR	Residential	100
1460215000	11112 W HERITAGE DR	CLARENCE K JOHNSON	Residential	100
1460216000	11130 W HERITAGE DR	BRENT R JONES	Residential	100
1460217000	11140 W HERITAGE DR	GLENN I UNDERWOOD	Residential	100
1460218000	11210 W HERITAGE DR	JOSEPH P PETERS	Residential	100
1460219000	11230 W HERITAGE DR	STEPHANIE SOVA	Residential	100
1460220000	11250 W HERITAGE DR	SEAN MCDOWELL	Residential	100
1460221000	11260 W HERITAGE DR	STANLEY F HARRIS	Residential	100
1460222000	6665 N 113TH ST	LAMON PIPPIN	Residential	100
1460223000	11001 W HERITAGE DR	WALTER C PERRY	Residential	100
1460224000	11021 W HERITAGE DR	DARLENE JENKINS	Residential	100
1460225000	11033 W HERITAGE DR	BEE XIONG	Residential	100
1460226000	11101 W HERITAGE DR	ANDREE S MCCLAIN	Residential	100
1460227000	11121 W HERITAGE DR	TASHIVA CARTER	Residential	100
1460228000	11135 W HERITAGE DR	NATHANIEL C GREEN	Residential	100
1460229000	11201 W HERITAGE DR	GREGORY L TURNER	Residential	100

1460230000	11225 W HERITAGE DR	CARLENE WADE	Residential	100
1460231000	11241 W HERITAGE DR	BLAINE YANG	Residential	100
1460232000	6666 N 110TH ST	TARUS L BURTON	Residential	100
1460241000	6704 N 108TH ST	REGINA S SIMS	Residential	100
1460242000	6671 N 107TH ST	CHRISTOPH FOERSTER	Residential	100
1460251000	11001 W MEADOWCREEK DR	BARRY APPLEWHITE	Residential	100
1460252000	10949 W MEADOWCREEK CT	KELVIN J ROBINSON	Residential	100
1460253000	10939 W MEADOWCREEK CT	CATHY A WEINSTEIN	Residential	100
1460254000	10929 W MEADOWCREEK CT	DAVID R SEAGER	Residential	100
1460255000	10915 W MEADOWCREEK CT	LONNIE J ANDERSON	Residential	100
1460256000	10901 W MEADOWCREEK CT	RACHEL ODAU NUSS	Residential	100
1460257000	10900 W MEADOWCREEK CT	KWADWO OSUWU-OFORI TOD	Residential	100
1460258000	10910 W MEADOWCREEK CT	RODNEY MOUTRY	Residential	100
1460259000	10930 W MEADOWCREEK CT	SHIRLEAN CLAYTON	Residential	100
1460260000	10940 W MEADOWCREEK CT, Unit .	CAROLYN TATE MCINTOSH LIVING TRUS	Residential	100
1460261000	6616 N 110TH ST	BRYAN M LYDAY	Residential	100
1460262000	6626 N 110TH ST	GREGORY C NELSON	Residential	100
1460263000	6640 N 110TH ST	ANTHONY G BREITRICK	Residential	100
1460264000	6650 N 110TH ST	ALICE W BRADSHAW	Residential	100
1460265000	6619 N 110TH ST	ELLIS JR,L J TOD	Residential	100
1460266000	6605 N 110TH ST	LONNIE D BARRY	Residential	100
1460267000	11004 W SANCTUARY DR	CHRISTOPHER D OLINGER	Residential	100
1460268000	11014 W SANCTUARY DR	THE MARTIN LIV TRT	Residential	100
1460271000	11224 W SANCTUARY DR	MARK W KALZ	Residential	100
1460272000	11212 W SANCTUARY DR	LARRY GALLOWAY	Residential	100
1460273000	11202 W SANCTUARY DR	NATHANIEL COLE	Residential	100
1460274000	11126 W SANCTUARY DR	LARINA L HIGHTOWER	Residential	100
1460275000	11116 W SANCTUARY DR	ALONZO G CHAPMAN	Residential	100
1460276000	11106 W SANCTUARY DR	GWENDOLYN HORTON	Residential	100
1460277000	11024 W SANCTUARY DR	NATALIA M YOUNG	Residential	100
1460278000	6645 N 113TH ST	SA YANG	Residential	100
1460279000	6641 N 113TH ST	LONZIE THOMPSON	Residential	100
1460280000	6635 N 113TH ST	TIMOTHY R STOTTS	Residential	100
1460281000	6625 N 113TH ST	SEGUN OMOLE	Residential	100
1460282000	11221 W SANCTUARY DR	JAMES G. BUSKE AND TERRY A. BUSKE F	Residential	100
1460283000	11211 W SANCTUARY DR	ANGIE L PACLEY	Residential	100
1460284000	11201 W SANCTUARY DR	DAREL H TEAT	Residential	100
1460285000	11125 W SANCTUARY DR	ALGERNON T JONES	Residential	100
1460286000	11115 W SANCTUARY DR	KAREN GIBBS	Residential	100
1460287000	11105 W SANCTUARY DR	BOBBY L PERRY JR	Residential	100
1460288000	11021 W SANCTUARY DR	HIEFANY K VOGUE	Residential	100
1460291000	6710 N 114TH ST	RICKEY JOHNSON JR	Residential	100
1460292000	6700 N 114TH ST	JAMES A WHEELER	Residential	100
1460301000	11222 W MEADOWCREEK DR	DARRELL L HINES II	Residential	100
1460302000	11214 W MEADOWCREEK DR	ERROL HOLMES TOD	Residential	100
1460303000	11204 W MEADOWCREEK DR	KHALIO T BORUM	Residential	100
1460304000	11124 W MEADOWCREEK DR	SCOTT D FIELDS	Residential	100
1460305000	11114 W MEADOWCREEK DR	JAMIA LOWE	Residential	100
1460306000	11104 W MEADOWCREEK DR	CORNELIUS L WHITESIDE II	Residential	100
1460307000	11010 W MEADOWCREEK DR	TERRANCE NEWELL	Residential	100
1460308000	11235 W MEADOWCREEK DR	CRYSTAL MCCLAIN	Residential	100
1460309000	11225 W MEADOWCREEK DR	ANDREA COLLIEN	Residential	100
1460310000	11215 W MEADOWCREEK DR	JORGE GUIFARRO	Residential	100
1460311000	11201 W MEADOWCREEK DR	GLORIA MADISON	Residential	100
1460312000	11125 W MEADOWCREEK DR	CHESTER TYLER	Residential	100
1460313000	11115 W MEADOWCREEK DR	ANTHONY R GALBARI	Residential	100
1460314000	11103 W MEADOWCREEK DR	MANUEL CORONA	Residential	100
1460315000	11011 W MEADOWCREEK DR	PHILIP GIUFFRE	Residential	100
1460316000	6555 N 113TH ST	PHILLIP N WOODS	Residential	100
1469967113	11000 W MILL RD	NEW RESTORATION CHRISTIN CHURCH	Residential	100
1469970000	6550 N 114TH ST	JOSEPH C ANDERSON	Residential	100

1469971000	6582 N 114TH ST	ROBERT J HANSTAD	Residential	100
1469973100	6650 N 114TH ST	KARL KEISERMAN	Residential	100
1469974100	6666 N 114TH ST	WALTER BISHOP TRUST	Residential	100
1469976000	11431 W DAPHNE ST	WILLIE GENE COLBERT	Residential	100
1469977113	11320 W DAPHNE ST	WILLIE COLBERT	Residential	100
1469977114	11306 W DAPHNE ST	PERRY L BISHOP	Residential	100
1469977200	11325 W DAPHNE ST	MARK E FOREMAN	Residential	100
1469978000	11330 W DAPHNE ST	LISA CLEVELAND	Residential	100
1469979000	6734 N 114TH ST	PARKER TIBBS	Residential	100
1469981000	6781 N 107TH ST	SUSAN L STEDMAN	Residential	100
1469983110	6755 N 107TH ST	DP VENTURE GROUP LLC	Residential	100
1469995000	6535 N 107TH ST	RACHAEL HOMES LLC	Residential	100
1469996000	6515 N 107TH ST	BERNARD E JAMES	Residential	100
1469997000	6505 N 107TH ST	LEONARD E WINDOM TOD	Residential	100
1140112100	11301 W METRO AUTO MALL	SBS PARTNERSHIP LLP	Special Mercantile	200
1140181000	11011 W METRO AUTO MALL	CARMAX AUTO SUPERSTORES INC	Special Mercantile	200
1140183000	10821 W METRO AUTO MALL	METRO AUTO PARK OWNER'S	Special Mercantile	0
1140201000	10901 W METRO AUTO MALL	METRO AUTO MALL LAND II LLC,	Special Mercantile	200
1140202000	10851 W METRO AUTO MALL	METRO AUTO MALL LAND II LLC,	Special Mercantile	200
				<b>20300</b>



**Appendix C**



**Appendix C**



## Appendix C



HERITAGE HEIGHTS NEIGHBORHOOD IMPROVEMENT DISTRICT #5

FINANCIAL STATEMENTS

FOR THE YEAR ENDED DECEMBER 31, 2021  
(Independent Auditor's Review Report Attached)

# HERITAGE HEIGHTS NEIGHBORHOOD IMPROVEMENT DISTRICT #5

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March 15, 2022

## INDEPENDENT AUDITOR'S REPORT

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

### Auditor Background and Scope of Audit

I (Juanita Banks) have 30+ plus years of audit, compliance and risk management experience and I hold a certification in each of these disciplines. My professional experience includes prior employment with Arthur Andersen, Brady Corporation, Northwestern Mutual and Protiviti. I am currently employed as the Vice President of Audit and Risk Management at American Transmission Company in Waukesha County.

The Board of Directors for Heritage Subdivision engaged me to perform an independent audit of all transactions processed during calendar year 2021 through the Heritage Heights NID #5 checking account. This is my fifth year performing the NID #5 financial audit.

The City of Milwaukee has requested confirmation from the Heritage Board of Directors that all expenditures to-date were appropriate and related to the maintenance and upkeep of the Heritage Subdivision.

### Audit Procedures

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 2021 bank statements to confirm that all transactions were accounted for within 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.

### Audit Conclusion

All transactions processed during calendar year 2021 were in alignment with the procurement policy and supported by receipts or commitments.

Sincerely,

**Juanita Banks**  
Digitally signed by Juanita Banks  
Date: 2022.03.15 23:24:38 -05'00'

Juanita Banks, Certified Public Accountant | Certified Internal Auditor | Certified Risk Manager

# Heritage Heights NID 5

## Statement of Financial Position

As of December 31, 2021

	TOTAL
<hr/>	
<b>ASSETS</b>	
Current Assets	
Bank Accounts	\$35,197.54
<b>Total Current Assets</b>	<b>\$35,197.54</b>
<b>TOTAL ASSETS</b>	<b>\$35,197.54</b>
<hr/>	
<b>LIABILITIES AND EQUITY</b>	
<b>Total Liabilities</b>	
Equity	\$35,197.54
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$35,197.54</b>
<hr/>	

# Heritage Heights NID 5

## Statement of Activities

January - December 2021

	TOTAL
Income	
2020 Assessments	20,300.00
<b>Total Income</b>	<b>\$20,300.00</b>
Total Revenue	<b>\$20,300.00</b>
Expenses	
Bank Charges & Fees	111.00
Insurance	670.00
Legal & Professional Services	1,705.26
Mailbox Project	620.00
Office Supplies & Software	330.80
Other Business Expenses	322.77
Repairs & Maintenance	785.00
Utilities	238.54
<b>Total Expenses</b>	<b>\$4,783.37</b>
NET OPERATING INCOME	<b>\$15,516.63</b>
NET INCOME	<b>\$15,516.63</b>

NOTES TO THE FINANCIAL STATEMENTS  
DECEMBER 31, 2021

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 (2023)**

**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 \$384,900 (Realtor.com Market Overview 2022) \$35,000.00 increase/2021

### **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