



Heritage Heights NID #5

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

NEIGHBORHOOD IMPROVEMENT DISTRICT NO. 5

**HERITAGE
HEIGHTS**

**2022
OPERATING PLAN**

September, 2022

TABLE OF CONTENTS

I	<u>INTRODUCTION</u>	Page 3
	A. Background	Page 3
II	<u>DISTRICT BOUNDARIES</u>	Page 3
III	<u>OPERATING PLAN</u>	Page 3
	A. Plan Objectives	Page 3
	B. Activities – 2022	Page 4
	C. Expenditures	Page 4
	D. Financing Method	Page 5
	E. Organization of NID #5 Board	Page 5
	F. Relationship to the GHNA	Page 6
	G. NID Property ownership Statement	Page 6
IV	<u>METHOD OF ASSESSMENT</u>	Page 6
	A. Assessment Rate and Method	Page 6
V	2022 <u>OPERATING PLAN</u>	Page 6
	A. Phased Development	Page 6
VIII	APPENDIX	Page 7
	A. NID #5 Map	Page 8
	B. Assessment Methodology and Property Exceptions	Page 9
	C. Retention Pond Photo Samples	Page 10

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 – 2022

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) Creation of an 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 – 2022

2022 Budget

INCOME: \$20,300

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

D. Financing Method

The 2022 \$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:** D. McKay
- **Director:** L. Thompson
- **Director:** L. Tyler
- **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 2022.

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, 2021, the property in NID #5 had a total assessed value of over \$109 million dollars.

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

V. 2022 OPERATING PLAN

A. Phased Development

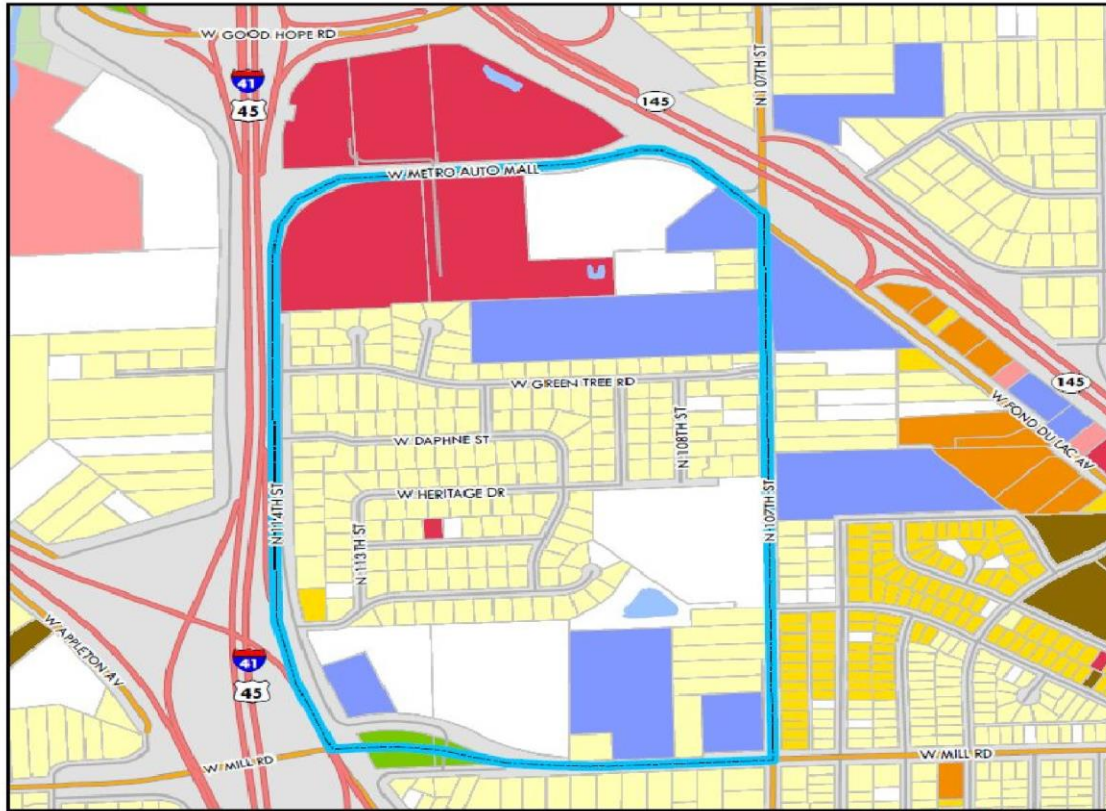
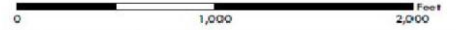
NID #5 will continue to revise and develop the Operating Plan annually, in response to changing development needs and opportunities in the district, in accordance with the purposes and objectives defined in this initial Operating Plan.

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

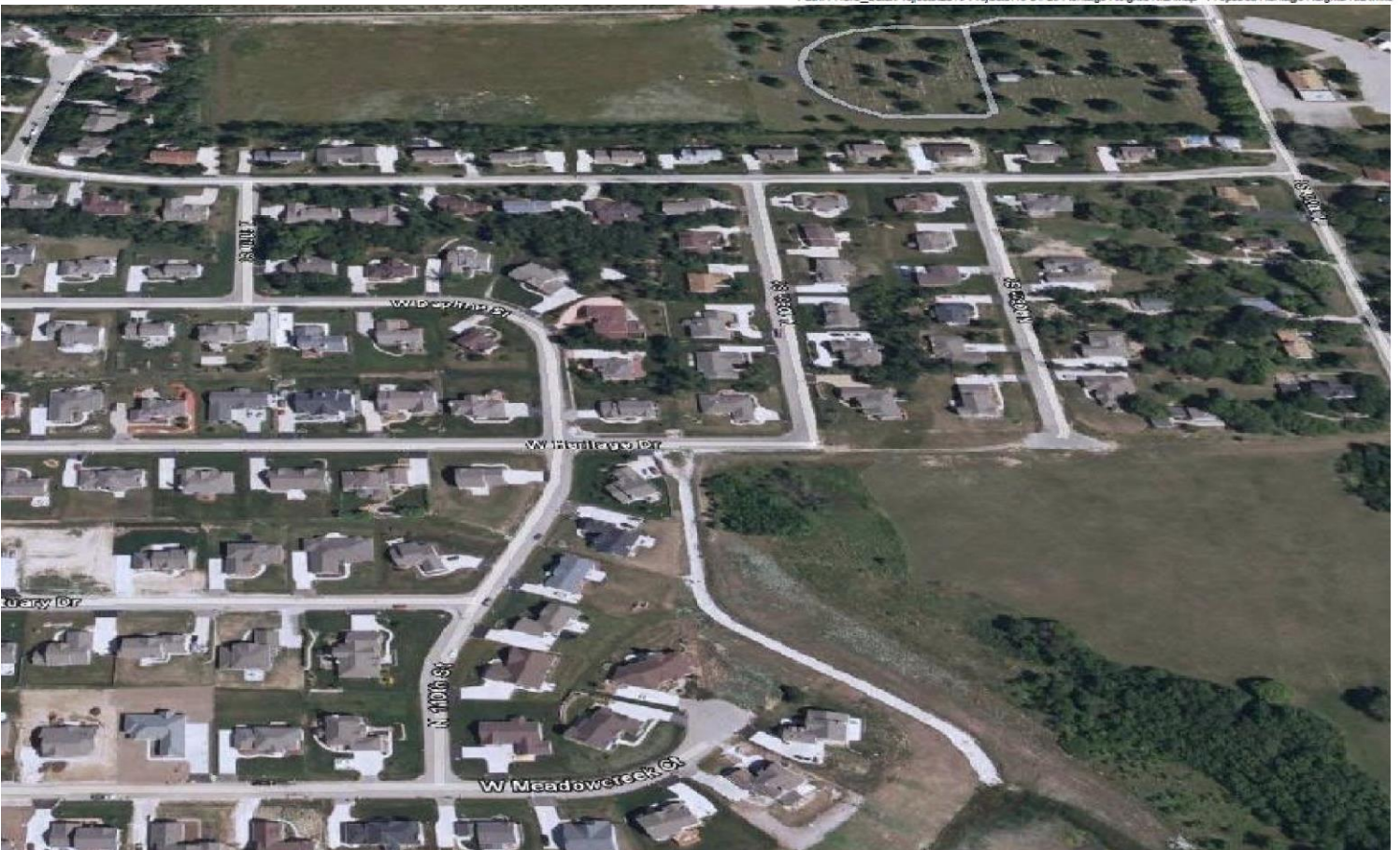
- Proposed NID Boundary
- Parcel Boundary

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. 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
1140112100	11301 W METRO AUTO	SBS PARTNERSHIP LLP	Special Merc	\$ 200.00
1140121000	11330 W GREEN TREE R	EVA MCDANIEL	Residential	\$ 100.00
1140122000	11320 W GREEN TREE R	DEMETRIUS DAVIS	Residential	\$ 100.00
1140131000	6840 N 114TH ST	ERIC R MOERCHEN	Residential	\$ 100.00
1140141000	6826 N COVENTRY CT	STARLETTE M PATTERSON	Residential	\$ 100.00
1140142000	6836 N COVENTRY CT	KELLY LEWIS	Residential	\$ 100.00
1140143000	6835 N COVENTRY CT	MICHAEL ROSS	Residential	\$ 100.00
1140144000	6825 N COVENTRY CT	GLADYS I MANZANET	Residential	\$ 100.00
1140145000	6811 N COVENTRY CT	LOUIS JOHNSON JR	Residential	\$ 100.00
1140146000	6820 N 114TH ST	PRESLEY CARLYLE	Residential	\$ 100.00
1140181000	11011 W METRO AUTO	CARMAX AUTO SUPERSTORE	Special Merc	\$ 200.00
1140183000	10821 W METRO AUTO	METRO AUTO PARK OWNER'S	Special Merc	\$ -
1140191000	6885 N 107TH ST	FREDDIE KEITH	Residential	\$ 100.00
1140192000	6875 N 107TH ST	JOSHUA J BAUER	Residential	\$ 100.00
1140193000	6865 N 107TH ST	TRESSA D BROWN	Residential	\$ 100.00
1140201000	10901 W METRO AUTO	METRO AUTO MALL LAND II	Special Merc	\$ 200.00
1140202000	10851 W METRO AUTO	METRO AUTO MALL LAND II	Special Merc	\$ 200.00
1149972110	11308 W GREEN TREE R	THOMAS M & GAYLA K BOEH	Residential	\$ 100.00
1460001000	11230 W DAPHNE ST	ROOSEVELT HOPSON	Residential	\$ 100.00
1460002000	11210 W DAPHNE ST	JOEL MC DADE	Residential	\$ 100.00
1460003000	11140 W DAPHNE ST	RONALD W ROBERTS	Residential	\$ 100.00
1460012000	10800 W MILL RD	ANDREW J WEINS	Residential	\$ 100.00
1460021100	6768 N 114TH ST	ANDREW S WARD I	Residential	\$ 100.00
1460032100	10920 W MILL RD	JONATHAN D DAVIS	Residential	\$ 100.00
1460041000	6475 N 107TH ST	EDWARD E MELLER	Residential	\$ 100.00
1460042000	6459 N 107TH ST	RAVINDRA K TALWALKER &	Residential	\$ 100.00
1460061100	11313 W GREEN TREE R	RONALD FERRILL	Residential	\$ 100.00
1460062100	11301 W GREEN TREE R	BRIAN BERNHARDT	Residential	\$ 100.00
1460071000	11313 W DAPHNE ST	WAYNE L SIMMONS	Residential	\$ 100.00
1460072000	11303 W DAPHNE ST	SAMMY JONES JR	Residential	\$ 100.00
1460081100	11235 W GREEN TREE R	STEVIE B SUMMERS	Residential	\$ 100.00
1460082100	11221 W GREEN TREE R	LUANN WEIK	Residential	\$ 100.00
1460083000	11209 W GREEN TREE R	ADRIUN DAVIS IRREVOCABLE	Residential	\$ 100.00
1460084000	11137 W GREEN TREE R	DAVID C WEST	Residential	\$ 100.00
1460086000	11107 W GREEN TREE R	WAYNE O. TANNER	Residential	\$ 100.00
1460087000	10722 W GREEN TREE R	MELISSA M THEISEN	Residential	\$ 100.00
1460088000	10740 W GREEN TREE R	CONWAY NIMMER JR	Residential	\$ 100.00
1460089000	10800 W GREEN TREE R	SAUD AHMED	Residential	\$ 100.00
1460090000	10814 W GREEN TREE R	CLIFFORD E THOMPSON	Residential	\$ 100.00
1460091000	10830 W GREEN TREE R	COREY L COLEMAN	Residential	\$ 100.00
1460092000	10904 W GREEN TREE R	DAVID G NABORS	Residential	\$ 100.00
1460093000	10920 W GREEN TREE R	VICTOR CAMPBELL	Residential	\$ 100.00
1460094000	10936 W GREEN TREE R	DUANE TURMAN SR	Residential	\$ 100.00

1460095000	11008 W GREEN TREE R	ANTHONY G BERENDT	Residential	\$ 100.00
1460096000	11022 W GREEN TREE R	SUSAN E STUERMER	Residential	\$ 100.00
1460098000	10706 W GREEN TREE R	MELISSA M THEISEN	Residential	\$ 100.00
1460099000	11033 W GREEN TREE R	KARINA BRANCO KIEFFER	Residential	\$ 100.00
1460100000	11019 W GREEN TREE R	JAMES P PURKO	Residential	\$ 100.00
1460101000	11007 W GREEN TREE R	FREDDY LEWIS JR	Residential	\$ 100.00
1460102000	10935 W GREEN TREE R	MARION L REITER TOD	Residential	\$ 100.00
1460103000	10921 W GREEN TREE R	THE SAMUEL M AND ALMA J	Residential	\$ 100.00
1460104000	10905 W GREEN TREE R	BRUCE D RICHARDS	Residential	\$ 100.00
1460105000	10823 W GREEN TREE R	RONALD K BROWN	Residential	\$ 100.00
1460106000	10807 W GREEN TREE R	JOSEPH T WILLIAMS JR	Residential	\$ 100.00
1460107000	10741 W GREEN TREE R	NATHAN SHORTER	Residential	\$ 100.00
1460108000	10705 W GREEN TREE R	HERITAGE MEADOWS STORM	Residential	\$ 100.00
1460111000	6761 N 109TH ST	CURTISS E HARRIS	Residential	\$ 100.00
1460112000	6749 N 109TH ST	CHRIS J VERHAALEN	Residential	\$ 100.00
1460113000	6735 N 109TH ST	ALONZO G CHAPMAN	Residential	\$ 100.00
1460114000	6721 N 109TH ST	DUANE H SWANK	Residential	\$ 100.00
1460115000	6718 N 110TH ST	PAMELA HUTCHINS	Residential	\$ 100.00
1460116000	6732 N 110TH ST	LONDON THOMAS	Residential	\$ 100.00
1460117000	11000 W DAPHNE ST	GREGORIE MCKAY	Residential	\$ 100.00
1460118000	11004 W DAPHNE ST	MELVIN FINKLEY	Residential	\$ 100.00
1460119000	11016 W DAPHNE ST	RODERICK L ROBERSON	Residential	\$ 100.00
1460120000	11028 W DAPHNE ST	WALTER SMITH	Residential	\$ 100.00
1460121000	11124 W DAPHNE ST	JOSEPH JEFFERSON	Residential	\$ 100.00
1460122000	11039 W DAPHNE ST	KEVIN NEALE	Residential	\$ 100.00
1460123000	11027 W DAPHNE ST	BETTY SUE & JIMMY CROCKE	Residential	\$ 100.00
1460124000	11015 W DAPHNE ST	RAYMOND E BANKS	Residential	\$ 100.00
1460125000	11001 W DAPHNE ST	MICHAEL G GEORGE	Residential	\$ 100.00
1460131000	11227 W DAPHNE ST	JANARDHANAN E CHERIYALA	Residential	\$ 100.00
1460132000	11211 W DAPHNE ST	JAMES R EWING	Residential	\$ 100.00
1460133000	11139 W DAPHNE ST	ODELL R MINOR	Residential	\$ 100.00
1460134000	11127 W DAPHNE ST	NICOLE J DAVILA	Residential	\$ 100.00
1460142000	11110 W GREEN TREE R	MARY COLLA	Residential	\$ 100.00
1460143000	6810 N 112TH CT	CHARTEISHA CARSON-CLARK	Residential	\$ 100.00
1460144000	6820 N 112TH CT	ARTHUR JONES	Residential	\$ 100.00
1460145000	6836 N 112TH CT	ALLEN N PERRY	Residential	\$ 100.00
1460146000	6846 N 112TH CT	JEFFREY B NORMAN	Residential	\$ 100.00
1460147000	6856 N 112TH CT	BRYAN K WILLIAMS	Residential	\$ 100.00
1460148000	6845 N 112TH CT	GARFIELD A PLUNKETT	Residential	\$ 100.00
1460149000	6835 N 112TH CT	DARRYL WINSTON	Residential	\$ 100.00
1460150000	6825 N 112TH CT	REGINALD D ADAMS	Residential	\$ 100.00
1460151000	11210 W GREEN TREE R	REGINA L YOUNG	Residential	\$ 100.00
1460161000	6679 N 107TH ST	MARK WEBER	Residential	\$ 100.00
1460171000	6705 N 107TH ST	DARRYL JOZEFczyk	Residential	\$ 100.00
1460172000	6724 N 108TH ST	ALEXANDER JOHNSON, SR.	Residential	\$ 100.00
1460173000	6725 N 108TH ST	DANIEL R KOMBEREC	Residential	\$ 100.00
1460174000	6722 N 109TH ST	JAMES E GLADNEY	Residential	\$ 100.00

1460181000	6764 N 109TH ST	JOHNNIE W SMITH II	Residential	\$ 100.00
1460182000	6765 N 108TH ST	THOMAS L DAVIS	Residential	\$ 100.00
1460183000	6752 N 109TH ST	SAMUEL CHAMONG YANG	Residential	\$ 100.00
1460184000	6745 N 108TH ST	TIMOTHEUS PARIS JR	Residential	\$ 100.00
1460185000	6740 N 109TH ST	CARMEN D BURTIN	Residential	\$ 100.00
1460186000	6733 N 108TH ST	RANDOLPH FULFER	Residential	\$ 100.00
1460187000	6756 N 108TH ST	NENG YANG	Residential	\$ 100.00
1460188000	6725 N 107TH ST	TIMOTHY J KUBIK	Residential	\$ 100.00
1460189000	6742 N 108TH ST	ANDRE CHAPMAN	Residential	\$ 100.00
1460190000	6721 N 107TH ST	KEVIN L REED	Residential	\$ 100.00
1460191000	6728 N 108TH ST	NICOL T PETERS-FREEMAN	Residential	\$ 100.00
1460192000	6715 N 107TH ST	GRANT A KARI	Residential	\$ 100.00
1460201000	6705 N 108TH ST	SYLVESTER GRANT	Residential	\$ 100.00
1460202000	6700 N 109TH ST	ROBERT A BREDENDICK TOD	Residential	\$ 100.00
1460203000	10908 W HERITAGE DR	KURT F KUETHER	Residential	\$ 100.00
1460204000	10932 W HERITAGE DR	GABRIEL KLETT-KIMBLE	Residential	\$ 100.00
1460211000	11010 W HERITAGE DR	PHELON THADISON	Residential	\$ 100.00
1460212000	11018 W HERITAGE DR	KAREN L PAYNE	Residential	\$ 100.00
1460213000	11030 W HERITAGE DR	MARK WADE	Residential	\$ 100.00
1460214000	11038 W HERITAGE DR	TRAVIS BROWN SR	Residential	\$ 100.00
1460215000	11112 W HERITAGE DR	CLARENCE K JOHNSON	Residential	\$ 100.00
1460216000	11130 W HERITAGE DR	BRENT R JONES	Residential	\$ 100.00
1460217000	11140 W HERITAGE DR	GLENN I UNDERWOOD	Residential	\$ 100.00
1460218000	11210 W HERITAGE DR	JOSEPH P PETERS	Residential	\$ 100.00
1460219000	11230 W HERITAGE DR	STEPHANIE SOVA	Residential	\$ 100.00
1460220000	11250 W HERITAGE DR	SEAN MCDOWELL	Residential	\$ 100.00
1460221000	11260 W HERITAGE DR	STANLEY F HARRIS	Residential	\$ 100.00
1460222000	6665 N 113TH ST	LAMON PIPPIN	Residential	\$ 100.00
1460223000	11001 W HERITAGE DR	WALTER C PERRY	Residential	\$ 100.00
1460224000	11021 W HERITAGE DR	DARLENE JENKINS	Residential	\$ 100.00
1460225000	11033 W HERITAGE DR	BEE XIONG	Residential	\$ 100.00
1460226000	11101 W HERITAGE DR	ANDREE S MCCLAIN	Residential	\$ 100.00
1460227000	11121 W HERITAGE DR	TASHIVA CARTER	Residential	\$ 100.00
1460228000	11135 W HERITAGE DR	NATHANIEL C GREEN	Residential	\$ 100.00
1460229000	11201 W HERITAGE DR	GREGORY L TURNER	Residential	\$ 100.00
1460230000	11225 W HERITAGE DR	JUANITA WADE	Residential	\$ 100.00
1460231000	11241 W HERITAGE DR	BLAINE YANG	Residential	\$ 100.00
1460232000	6666 N 110TH ST	TARUS L BURTON	Residential	\$ 100.00
1460241000	6704 N 108TH ST	REGINA S SIMS	Residential	\$ 100.00
1460242000	6671 N 107TH ST	CHRISTOPH FOERSTER	Residential	\$ 100.00
1460251000	11001 W MEADOWCREE	BARRY APPLEWHITE	Residential	\$ 100.00
1460252000	10949 W MEADOWCREE	KELVIN J ROBINSON	Residential	\$ 100.00
1460253000	10939 W MEADOWCREE	CATHY A WEINSTEIN	Residential	\$ 100.00
1460254000	10929 W MEADOWCREE	DAVID R SEAGER	Residential	\$ 100.00
1460255000	10915 W MEADOWCREE	LONNIE J ANDERSON	Residential	\$ 100.00
1460256000	10901 W MEADOWCREE	RACHEL ODAU NUSS	Residential	\$ 100.00
1460257000	10900 W MEADOWCREE	PHELON THOMAS	Residential	\$ 100.00

1460258000	10910 W MEADOWCREE	RODNEY MOUTRY	Residential	\$ 100.00
1460259000	10930 W MEADOWCREE	SHIRLEAN CLAYTON	Residential	\$ 100.00
1460260000	10940 W MEADOWCREE	FRANKLIN MCINTOSH	Residential	\$ 100.00
1460261000	6616 N 110TH ST	BRYAN M LYDAY	Residential	\$ 100.00
1460262000	6626 N 110TH ST	GREGORY C NELSON	Residential	\$ 100.00
1460263000	6640 N 110TH ST	ANTHONY G BREITRICK	Residential	\$ 100.00
1460264000	6650 N 110TH ST	ALICE W BRADSHAW	Residential	\$ 100.00
1460265000	6619 N 110TH ST	LJ ELLIS JR	Residential	\$ 100.00
1460266000	6605 N 110TH ST	JUANETTA ROBERTSON	Residential	\$ 100.00
1460267000	11004 W SANCTUARY D	CHRISTOPHER D OLINGER	Residential	\$ 100.00
1460268000	11014 W SANCTUARY D	THE MARTIN LIV TRT	Residential	\$ 100.00
1460271000	11224 W SANCTUARY D	MARK W KALZ	Residential	\$ 100.00
1460272000	11212 W SANCTUARY D	LARRY GALLOWAY	Residential	\$ 100.00
1460273000	11202 W SANCTUARY D	NATHANIEL COLE	Residential	\$ 100.00
1460274000	11126 W SANCTUARY D	LARINA L HIGHTOWER	Residential	\$ 100.00
1460275000	11116 W SANCTUARY D	ALONZO G CHAPMAN	Residential	\$ 100.00
1460276000	11106 W SANCTUARY D	GWENDOLYN HORTON	Residential	\$ 100.00
1460277000	11024 W SANCTUARY D	JUSTIN STODOLA	Residential	\$ 100.00
1460278000	6645 N 113TH ST	SA YANG	Residential	\$ 100.00
1460279000	6641 N 113TH ST	LONZIE THOMPSON	Residential	\$ 100.00
1460280000	6635 N 113TH ST	TIMOTHY R STOTTS	Residential	\$ 100.00
1460281000	6625 N 113TH ST	SEGUN OMOLE	Residential	\$ 100.00
1460282000	11221 W SANCTUARY D	JAMES G BUSKE	Residential	\$ 100.00
1460283000	11211 W SANCTUARY D	ANGIE L PACLEY	Residential	\$ 100.00
1460284000	11201 W SANCTUARY D	ROSEANN LOCOCO	Residential	\$ 100.00
1460285000	11125 W SANCTUARY D	ALGERNON T JONES	Residential	\$ 100.00
1460286000	11115 W SANCTUARY D	KAREN GIBBS	Residential	\$ 100.00
1460287000	11105 W SANCTUARY D	BOBBY L PERRY JR	Residential	\$ 100.00
1460288000	11021 W SANCTUARY D	HIEFANY K VOGUE	Residential	\$ 100.00
1460291000	6710 N 114TH ST	RICKEY JOHNSON JR	Residential	\$ 100.00
1460292000	6700 N 114TH ST	JAMES A WHEELER	Residential	\$ 100.00
1460301000	11222 W MEADOWCREE	DARRELL L HINES II	Residential	\$ 100.00
1460302000	11214 W MEADOWCREE	ERROL HOLMES TOD	Residential	\$ 100.00
1460303000	11204 W MEADOWCREE	KHALIO T BORUM	Residential	\$ 100.00
1460304000	11124 W MEADOWCREE	SCOTT D FIELDS	Residential	\$ 100.00
1460305000	11114 W MEADOWCREE	JAMIA LOWE	Residential	\$ 100.00
1460306000	11104 W MEADOWCREE	LARRY ELLIS	Residential	\$ 100.00
1460307000	11010 W MEADOWCREE	TERRANCE NEWELL	Residential	\$ 100.00
1460308000	11235 W MEADOWCREE	CRYSTAL MCCLAIN	Residential	\$ 100.00
1460309000	11225 W MEADOWCREE	ANDREA COLLIEN	Residential	\$ 100.00
1460310000	11215 W MEADOWCREE	JORGE GUIFARRO	Residential	\$ 100.00
1460311000	11201 W MEADOWCREE	GLORIA MADISON	Residential	\$ 100.00
1460312000	11125 W MEADOWCREE	CHESTER TYLER	Residential	\$ 100.00
1460313000	11115 W MEADOWCREE	ANTHONY R GALBARI	Residential	\$ 100.00
1460314000	11103 W MEADOWCREE	MANUEL CORONA	Residential	\$ 100.00
1460315000	11011 W MEADOWCREE	PHILIP GIUFFRE	Residential	\$ 100.00
1460316000	6555 N 113TH ST	PHILLIP N WOODS	Residential	\$ 100.00

1460322000	11224 W MILL RD	NEW RESTORATION CHRISTIA	Local Comme	\$ 100.00
1469967113	11000 W MILL RD	NEW RESTORATION CHRISTIN	Residential	\$ 100.00
1469970000	6550 N 114TH ST	JOSEPH C ANDERSON	Residential	\$ 100.00
1469971000	6582 N 114TH ST	ROBERT J HANSTAD	Residential	\$ 100.00
1469973100	6650 N 114TH ST	KARL KEISERMAN	Residential	\$ 100.00
1469974100	6666 N 114TH ST	WALTER BISHOP TRUST	Residential	\$ 100.00
1469976000	11431 W DAPHNE ST	WILLIE GENE COLBERT	Residential	\$ 100.00
1469977113	11320 W DAPHNE ST	WILLIE COLBERT	Residential	\$ 100.00
1469977114	11306 W DAPHNE ST	PERRY L BISHOP	Residential	\$ 100.00
1469977200	11325 W DAPHNE ST	MARK E FOREMAN	Residential	\$ 100.00
1469978000	11330 W DAPHNE ST	LISA CLEVELAND	Residential	\$ 100.00
1469979000	6734 N 114TH ST	PARKER TIBBS	Residential	\$ 100.00
1469981000	6781 N 107TH ST	SUSAN L STEDMAN	Residential	\$ 100.00
1469983110	6755 N 107TH ST	DP VENTURE GROUP LLC	Residential	\$ 100.00
1469995000	6535 N 107TH ST	RACHAEL HOMES LLC	Residential	\$ 100.00
1469996000	6515 N 107TH ST	BERNARD E JAMES	Residential	\$ 100.00
1469997000	6505 N 107TH ST	LEONARD E WINDOM TOD	Residential	\$ 100.00

\$ 20,200.00



Appendix C



Appendix C



Appendix C



Heritage Heights

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

NID #5

ANNUAL REPORT (2022)

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.



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

NID #5

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 \$349,900 (Realtor.com Market Overview 2021) \$6,000.00 increase/2020

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 Enhancement Projects
- Secure Water Management Grants **Marketing & Branding**
- Recognition (Awards, newspaper/TV mentions)
- Grants



NID #5

- **NID Facebook Page & Website Link with GHNA Neighborhood Association**
- **Neighbor to Neighbor Advocacy**
- **Community Electronic file cabinet**
- **Community Newsletter**

Core Events

- Neighborhood Block Party
- 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

- Advisory Lawyer Consortium
- Communication
- Resident Involvement
- Community Calendar
- Strategic Planning



Heritage Heights

NID #5

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

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 2020 through the Heritage Heights NID #5 checking account. This is my fourth 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 and Board objectives, and reasonableness of the expenditure, noting no exceptions.
5. Traced all deposits to source documents, noting no exceptions.
6. Reviewed the 2020 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 a discrepancy of \$696.01. The G/L is \$696.01 higher than the bank statement balance. This discrepancy is likely tied to the 2019 mailbox project and the accounting irregularities identified in my audit report dated September 22, 2020. Recommendation: Record a reconciling journal entry to balance the G/L and ensure that all transaction flow through the G/L moving forward as outlined in the September 22, 2020 Audit Report.

Audit Conclusion

All transactions processed during calendar year 2020 were in alignment with the procurement policy and supported by receipts.

Sincerely,

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

AUDIT RECOMMENDATION #1

Compared the year-end bank statement balance to the (G/L) year-end balance, noting a discrepancy of \$696.01. The G/L is \$696.01 higher than the bank statement balance. This discrepancy is likely tied to the 2019 mailbox project and the accounting irregularities identified in my audit report dated September 22, 2020. **Recommendation:** Record a reconciling journal entry to balance the G/L and ensure that all transaction flow through the G/L moving forward as outlined in the September 22, 2020, Audit Report.

AGREE/DISAGREE: **Agree**

NID RESPONSE

Per the auditor's recommendation, a reconciling journal entry in the amount of \$696.01 was created to balance the general ledger and bank account. The auditor's recommendations from our 2020 mid-year audit were immediately implemented ensuring all subsequent transactions have flowed through the general ledger and bank statement.

NOTES: **None**