

**Oakland Ave.  
Business Improvement District #13**

**OPERATING PLAN FOR YEAR 33:  
2024**

**SUBMITTED BY:**

**THE OAKLAND AVENUE BUSINESS IMPROVEMENT DISTRICT  
BOARD OF DIRECTORS**

**PREPARED BY: Michael D'Amato, BID Director**

**OPERATING PLAN  
BID #13**

**2025: Year 33**

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## **I. INTRODUCTION**

In 1984, the Wisconsin legislature created s. 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, to manage and promote the districts and to establish an assessment method to fund these activities." (1983 Wis. Act 184, Section 1, legislative declaration.) On November 9, 1993, the Common Council of the City of Milwaukee, by Resolution File Number 931058, created BID #13 (Oakland Avenue: University Square) and adopted its initial operating plan. Section 66.1109 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 its approval." The Board of BID #13 submits this 2023 Operating Plan in fulfillment of the statutory requirement.

This plan proposes a continuation of activities described in the initial (November 1993) BID Operating Plan and subsequent years' University Square Operating Plans. Therefore, it incorporates by reference all earlier plans as adopted by the Common Council. This plan emphasizes the elements that are required by Sec. 66.1109 Wis. Stats and the changes for 2022. It does not repeat the background information which is contained in the previous plans nor include the Business Improvement District Statute, original petitions from property owners or BID #13 By-Laws. The link to the State Statute is here:  
<https://docs.legis.wisconsin.gov/statutes/statutes/66/XI/1109>

## **II. DISTRICT BOUNDARIES**

Boundaries of the proposed district are North Oakland Avenue, between East Linwood on the north and East Newberry Blvd, on the south and along East Locust Street a half-block to each alleyway both east and west of North Oakland Ave. A listing of the properties included in the district is provided in the attached Excel Spreadsheet entitled BID #13 2024 Assessments.

## **III. PROPOSED OPERATING PLAN**

### **A. Plan Objective**

The Plan Objectives of Business Improvement District #13 involve utilizing available funds to continue to improve the business climate for existing and new district merchants. The available funds will be utilized for continued existence of critical projects such as the graffiti removal, street sanitation maintenance, flower planting, holiday lights and streetscaping. We will continue to encourage more opportunities for art to be incorporated into the district.

Additional funds are utilized for general operating expenses of the BID, Other improvements may be made as decided by the BID members.

The priorities of the BID Board for 2024 are as stated:

1. Act as a catalyst for private investment by owners and tenants in their properties through continuation of the street re-building process.

2. Continue our landscaping program initiated in 2003 using planter baskets. In 2018 the BID reinvested in landscaping through the purchase of new pole attached flower baskets. The BID also professionalized the service of these plantings by engaging a professional landscaping firm. That relationship has produced a noticeable improvement and will be continued.
3. Continue existing programs including, the Graffiti Removal Program, the Street Maintenance program along with ongoing assessment of critical general safety and cleanliness matters for improvement of the overall appearance of the district.
4. Revive exploration of possible streetscape improvements, utilizing existing funds, which will help create an identity for the district, keep customers on the street 18 hours/day and bolster pedestrian safety.
5. Explore infrastructure projects to promote safe and slower driving. This is especially critical on the 2900 block, where a mid-block bump out would improve both pedestrian safety and help slow speeds. Milwaukee's Department of Public Works has been engaged in this process, along with Alderman Brostoff's leadership, and is exploring different options and funding sources.
6. Maintain Holiday decorations to be mounted on existing harp lights. As well, explore the design and purchase of banners to erect on harp lights.
7. Work with Milwaukee Police Department, Milwaukee City Attorney's office and the Milwaukee County District Attorney's office to enhance safety in the area, combat the sale of illegal substances and improve the health, safety and welfare of citizens on the street to improve the shopping and dining experience.
8. Assist with the creation and funding of at least one new storefront, parklet, mural or artistic sign to create a more noticeable and attractive commercial corridor.

Meeting these objectives will enhance the business area's competitiveness relative to other shopping areas that are also currently undergoing rehabilitation, while enhancing the surrounding neighborhood. The BID will continue to work with DCD, DPW, the City Council and area merchants to achieve stated objectives.

## **B. Highlights of Activity from Year 31- 2023**

- The BID participated in the regular annual activity of keeping the street in a clean and maintained condition through our cleaning service with Riverworks Cleans.
- Assisting with search for commercial tenant for mixed-use development at the northeast corner of Oakland and Locust (2900 Apartments). A new BW3-togo restaurant was licensed and is open as the first such location in the State of Wisconsin.
- The BID continues to be actively involved in supporting the new development. Potential tenants were shown the large vacant property at 2856 N. Oakland Avenue.
- A promising new tenant (coffee lounge) has been secured by the owners of The East Sider which will add significantly to activity on the street.

- The new owners at Lisa's Pizza have added a parklet at 2961 N. Oakland Avenue. Although the BID did not contribute to this effort, the parklet has added to the "sidewalk" dining that is desperately needed on the street. The investment by Lisa's owners is greatly appreciated by the BID.
- Continued efforts to add to the mix of board members. In a very small BID district.
- Continued working with Alderman Brostoff and the Department of Public Works on securing a city commitment for matching funds to install a mid-block crossing on the 2900 Block of Oakland to slow traffic, improve pedestrian safety and make the entire district more attractive to pedestrians and bikers.
- Intervened in a situation between neighbors, Friends of Riverside Park and Little Caesar's Pizza, 2831 N. Oakland Avenue, to remedy an ongoing trash issue. The BID brokered a deal by which Little Caesar's will contribute \$3,000 annually to the clean-up of the area in and around the Riverside Park Playground to keep the area litter free and improve the overall quality of life in the park and playground. This funding will continue into 2025.

### **C. Proposed Activities — Year 33**

The principal activities to be undertaken by the district during its 33rd year of operation to achieve stated objectives will include:

1. Continue work on business recruitment and retention initiatives. Efforts will be made to work with new owners to improve properties and fill storefronts. Staff will continue to provide technical assistance to new and existing businesses regarding location, improvements, or expansion. Cooperative efforts of the BID Members, merchants, City officials and staff will be necessary to achieve desired outcomes.
2. Seek new development opportunities for reuse of underused or blighted buildings on the street with special emphasis on the west side of the 2900 block of N. Oakland and 2856 N. Oakland.
3. Staff will continue to work with the owners to modernize another storefront, look for additional parklet opportunities, new development opportunities on the street and fill newly converted storefronts.
4. Continue with arts and beautification efforts. This may include artistic business signs painted on buildings to replicate the types of signs that were common in the city mid to early last century.
5. Coordination and monitoring of the Graffiti Removal and Street Maintenance Program for area merchants.
6. Continued communication of BID Board Activities to members of the BID.
7. Coordinate new ideas for business district identity.
8. Identify and execute projects that will enhance the physical environment in order to attract and retain customers in the district, specifically outdoor dining on both private and public property.

9. Work with BIDs from East Side, Downer, Brady and Shorewood to explore possible events and work together to improve the east side.
10. Work with Alderman Brostoff and DPW to improve safety for pedestrians and bikers while slowing speeds in the district.

#### **D. Proposed Expenditures – Year Thirty**

##### Program Expenses

Possible contribution for infrastructure improvement	\$ 25,000
Streetscape Maintenance Program:	\$ 7,000
Planter landscaping:	\$ 10,000
Graffiti Removal Expenses:	\$ 1,000
Marketing:	\$ 1,000
Professional Services:	\$ 3,600
Holiday Lighting installation	\$ 4,500
Utilities	\$ 600

Total expenditures: \$ 52,700

##### Operating Revenues:

Adopted Year 33 Special Assessments (City Milw.):	\$ 25,000
Year 32 Special Assessment (paid at audit submission)	\$25,000
Carry Over, 2024 funds:	\$ 41,000 (est.)
<hr style="border-top: 1px dashed black;"/>	
Total available revenues:	\$ 91,000 (est)

#### **E. Financing Method**

It is estimated that the district will carry forward approximately \$67,000 from 2024. On October 1, 2013, the Board voted to collect \$25,000 from district property owners. This reflects 50% of the traditional annual amount of \$50,000 collected from the BID's inception to 1994. The BID will collect \$25,000 from property owners through the special assessment and use approximately \$67,000 in reserves to pay for the services and projects that they have determined to be essential to the health of the district and endeavor on new projects that will move the street forward and improve the health and vitality of the district. At our annual meeting in December of 2024 the Board will discuss increasing the assessment beginning in year 34 from \$25,000 to reflect increased cost in street maintenance, landscaping services and holiday lighting installation.

## **F. Organization of BID Board**

The Board's primary responsibility will be implementation of this Operating Plan. This will require the Board to negotiate with providers of services and materials to carry out the Plan; to enter various contracts; to monitor development activity; to periodically revise the Operating Plan; to ensure district compliance with the provisions of applicable statutes and regulations; and to make reimbursements for any overpayment of BID assessments.

## **IV. METHOD OF ASSESSMENT**

### **A. Assessment Rate and Method**

The principle behind the assessment methodology is that each property should contribute to the BID in proportion to the benefit derived from the BID. The method of assessment is a 50% split between assessed value and linear front footage. Property owners believe this to be a method that considers all characteristics of a property in relation to benefits derived. The formula is identical to the formula adopted by the board for 2024. In 2018 the BID was required to comply with a new state law that limits the collections received from mixed use properties to proportion of assessed value that is used for non-residential purposes. There were 14 properties that had their assessments reduced because of this change in state law. As a result, the burden of payment on the other contributing properties was increased to meet the annual minimum assessment.

### **Excluded/Exempt Property and Residential Hotel Assessment**

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

1. State Statute 66.1109: The district will 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. State Statute 66.1109: Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix A, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding State Statute 66.1109, property exempt from general real estate taxes has been excluded from the district. Privately owned tax-exempt property adjoining the district and which is expected to benefit from district activities may be asked to make a financial contribution to the district on a voluntary basis.
4. Property determined to be a residential hotel (mercantile apartments) will be assessed at half the rate of normal assessment per BID By-laws.

## **V. RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN AND ORDERLY DEVELOPMENT OF THE CITY**

### **A. City Plans**

BID #13 was actively involved in the development of the adopted Northeast Side plan and will pursue improvements to the area that are consistent with that plan.

### **B. City Role in District Operations**

The City of Milwaukee has committed to helping private property owners in the district. To this end, the City expected to play a significant role in the creation

of the Business Improvement District and in the implementation of the Operating Plan. In particular, the City will:

- Provide technical assistance to the proponents of the district through adoption of the Plan and aid as appropriate thereafter.
- Monitor and, when appropriate, apply for outside funds that could be used in support of the district. Work with the BID to identify a city contribution to assist with a major streetscape project.
- Collect assessments, maintain in a segregated account, and disburse the monies of the district.
- Receive bi-annual audits. Given the small size of the BID and the cost of audits, it is difficult to find an auditor that will take on this small a project. The BID is able to justify the cost of audit only by accomplishing the task every two years so that BID funds can be used to improve the district rather than for these services.
- Provide the Board, through the Tax Commissioner's Office on or before June 1<sup>st</sup> of each Plan year, with the official city records on the assessed value of each tax key number with the district, as of January 1<sup>st</sup> each Plan year, for purposes of calculating the BID assessments.
- Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.
- Prepare, with the participation of the BID Board, the development agreement described in section III.B. and section III.D of this plan and submit the draft agreement to the BID Board and the appropriate city officials for their consideration.

## **VI. FUTURE YEAR OPERATING PLANS**

### **A. Phased Development**

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 the initial Operating Plan.

Section 66.1109 of the BID law requires the 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 program, it focuses upon Year 33 activities, and information on specific assessed values, budget amounts and assessment amounts are based on Year 32 conditions. Greater detail about subsequent year's activities will be provided in the required annual Plan updates, and approval by the Common Council of such Plan updates shall be conclusive evidence of compliance with this 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. However, the method of assessing shall not be materially altered, except with the consent of the City of Milwaukee.

## **B. Amendment, Severability and Expansion**

This BID has been created under authority of /66/XI/1109of 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 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 a certain class or classes of properties, then this BID Plan may be amended by the Common Council of the City of Milwaukee as and when it conducts its annual Operating Plan approval and without necessity to undertake any other act. This is specifically authorized under State statutes/66/XI/1109

**APPENDIX A**

**2022 BOARD OF DIRECTORS BID #13 – Oakland and Locust**

**Clark Kaufmann, President/Treasurer –**

Owner of Clark Graphics, 2915 N. Oakland Avenue

**Sal Lococo, Secretary –**

Owner of Sal's on Oakland, 2919 N. Oakland Avenue

**Joe Wilson, Member – (nominated)**

Manager of Goodwill, 2830 N. Oakland Avenue

**Tom Aldridge, Member –**

Owner of George Webb's, 2935 N. Oakland Avenue

**Michael Vitucci, Member**

Owner of property at 2847 – 2851 N. Oakland Avenue

**Dr. Richard Lagerman, DDS, Member**

Owner, Lagerman Dental- 2929 N. Oakland Avenue

**Heather Huhn, (nominated)**

Owner, Cheba Hut - 2907 N. Oakland Avenue

OAKLAND AVENUE BID #13 - FINAL ASSESSMENTS FOR 2023

TAX KEY NO.	HOUSE	STREET	OWNER NAME	ADJUSTMENT FACTOR	2024 ASSESSMENT	ADJUSTED TOTAL FOR 2967 OAKLAND	COMMERCIAL SQ.FT	BUILD SQ.FT	MIXED USE FACTOR	MIXED USED ASSESSED VALUE ADJUSTMENT	FRONT FT	ADJUSTED FRONT FT FOR 2967	MIXED USE FRONT FT ADJUSTMENT	ASSESSMENT PER VALUE	ASSESSMENT PER FRONT FT	FINAL 2023 BID ASSESSMENT
3150002000	2977	OAKLAND	2977-79 N. Oakland Ave. LLC	1	\$436,800	\$436,800.00	1400	3590	39%	\$170,339.83	31	31	12.09	\$319.17	\$217.01	\$268.09
3150003000	2975	OAKLAND	JEREMIAH R FASS	1	\$343,700	\$343,700.00	1476	3600	41%	\$140,917.00	30	30	12.30	\$264.04	\$220.78	\$242.41
3150004000	2967	OAKLAND	SOON JA CHOI	0.5	\$1,414,200.00	\$707,100.00	0	10533	100%	\$707,100.00	60	30	30.00	\$1,324.91	\$538.49	\$931.70
3150005000	2961	OAKLAND	GARY J Biogiorno	1	\$505,800.00	\$505,800.00	1698	3088	55%	\$278,124.48	30	30	16.50	\$521.13	\$296.17	\$408.65
3150006000	2957	OAKLAND	MICHAEL BONGIORNO & JANET	0	\$164,100.00	\$0.00	0	1785	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3150007000	2955	OAKLAND	Mary Lou Kelley Trust	1	\$230,900.00	\$230,900.00	1900	1900	100%	\$230,900.00	30	30	30.00	\$432.64	\$538.49	\$485.57
3150008000	2949	OAKLAND	M & J OAKLAND LLC	1	\$282,200.00	\$282,200.00	1186	2280	52%	\$146,793.51	30	30	15.61	\$275.05	\$280.20	\$277.63
3150009000	2945	OAKLAND	2835 M LLC	1	\$279,200.00	\$279,200.00	725	3152	23%	\$64,219.54	30	30	6.90	\$120.33	\$123.85	\$122.09
3150010000	2943	OAKLAND	H&A Property MGMT LLC	1	\$420,500.00	\$420,500.00	928	2380	39%	\$163,959.66	30	30	11.70	\$307.21	\$210.01	\$258.61
3150301000	2937	OAKLAND	Matthew Kahl	0	\$190,400.00	\$0.00	0	2194	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3150302000	2935	OAKLAND	Joel E. Garber 2012 TR D/6/20/	1	\$365,500.00	\$365,500.00	2003	2003	100%	\$365,500.00	30	30	30.00	\$684.85	\$538.49	\$611.67
3150303000	2929	OAKLAND	Lagerman Dental LLC	1	\$296,300.00	\$296,300.00	1626	2710	60%	\$177,780.00	30	30	18.00	\$333.11	\$323.09	\$328.10
3150304000	2927	OAKLAND	ABUKHAMTIREH LLC	1	\$322,200.00	\$322,200.00	748	2414	31%	\$99,836.62	30	30	9.30	\$187.07	\$166.93	\$177.00
3150305000	2921	OAKLAND	2921-2923 N. OAKLAND AVENUE, LLC	1	\$571,600.00	\$571,600.00	2279	3998	57%	\$325,832.02	45	45	25.65	\$610.52	\$460.41	\$535.47
3150306100	2915	OAKLAND	2915 N. OAKLAND AV LLC	1	\$217,600.00	\$217,600.00	3600	3600	100%	\$217,600.00	45	45	45.00	\$407.72	\$807.74	\$607.73
3150307110	2907	OAKLAND	SO-FEE PROPERTIES LTD	1	\$1,317,800.00	\$1,317,800.00	6882	7095	100%	\$1,317,800.00	91	91	91.00	\$2,469.19	\$1,633.42	\$2,051.31
3151201000	1719	LOCUST	WASH BUILDING LLC	1	\$334,300.00	\$334,300.00	3000	3000	100%	\$334,300.00	60	60	60.00	\$626.39	\$1,076.98	\$851.69
3151202000	2857	OAKLAND	ALLAN R RAMUSSEN	1	\$900,600.00	\$900,600.00	4456	7426	60%	\$540,408.51	91	91	54.60	\$1,012.57	\$980.05	\$996.31
3151203000	2853	OAKLAND	ALLAN R RAMUSSEN	1	\$498,400.00	\$498,400.00	3272	5740	57%	\$284,105.37	30	30	17.10	\$532.33	\$306.94	\$419.64
3151204000	2845	OAKLAND	2845 OAKLAND LLC	1	\$821,300.00	\$821,300.00	3434	6734	51%	\$418,821.53	60	60	30.60	\$784.75	\$549.26	\$667.01
3151301000	2831	OAKLAND	Little Caesar's Enterprises	1	\$184,700.00	\$184,700.00	1220	1220	100%	\$184,700.00	120	120	120.00	\$346.08	\$2,153.97	\$1,250.03
3160078000	1814	NEWBERRY	KEVIN B DJUNN	0	\$320,900.00	\$0.00	0	3046	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3160079000	1806	NEWBERRY	MURRAY HILLS INVESTMENT	0	\$363,600.00	\$0.00	0	3440	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3160080000	1802	NEWBERRY	MICHAEL BRODERICK	0	\$393,300.00	\$0.00	0	3939	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3160081000	2812	OAKLAND	CONNOR J BRODERICK	0	\$246,300.00	\$0.00	0	1984	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3160753111	2830	OAKLAND	OAKLAND AVENUE II LLC	1	\$1,138,600.00	\$1,138,600.00	9289	9289	100%	\$1,138,600.00	184	184	184.00	\$2,133.42	\$3,302.75	\$2,718.09
3160754000	2840	OAKLAND	Olympia IV LLC	1	\$791,800.00	\$791,800.00	8703	8703	100%	\$791,800.00	60	60	60.00	\$1,483.61	\$1,076.98	\$1,280.30
3160755000	2850	OAKLAND	OLYMPIA-KALTS LLC	1	\$1,098,600.00	\$1,098,600.00	7726	14048	55%	\$604,198.72	116	116	63.80	\$1,132.10	\$1,145.19	\$1,138.65
3160756000	2864	OAKLAND	WCP INVESTMENTS LLC	1	\$909,600.00	\$909,600.00	3775	6990	54%	\$491,236.05	31	31	16.74	\$920.44	\$300.48	\$610.46
3161891000	2900	OAKLAND	LOCUST PROPCO, LLC	1	\$9,825,800.00	\$9,825,800.00	4987	55415	9%	\$884,259.94	121	121	10.89	\$1,656.86	\$195.47	\$926.17
3161119100	2974	OAKLAND	CARVER PROPERTY	1	\$399,700.00	\$399,700.00	0	1812	100%	\$399,700.00	60	60	60.00	\$748.93	\$1,076.98	\$912.96
3161120000	2968	OAKLAND	LILAC PROPERTIES LLC	0	\$1,260,800.00	\$0.00	0	11451	0%	\$0	0	0	0.00	\$0.00	\$0.00	\$0.00
3161871000	2950	OAKLAND	ARYEETEEY REAL ESTATE HOLDINGS LLC	1	\$2,863,600.00	\$2,863,600.00	14823	14823	100%	\$2,863,600.00	361	361	361.00	\$5,365.59	\$6,479.85	\$5,922.72
TOTAL:					\$29,710,700.00	\$26,064,200.00		1836		\$13,342,432.78	1806	1806	1392.78	\$25,000.00	\$24,990.00	\$25,000.00

ANNUAL COST \$25,000.00

ADJUSTMENT FACTOR = 0: EXCLUSIVELY RESIDENTIAL PARCELS NOT ASSESSED

= Exempt Property  
= Mixed Use Property