

**WEST NORTH AVENUE
BUSINESS IMPROVEMENT DISTRICT NO. 16
2005 OPERATING PLAN**

September 13, 2004

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WEST NORTH AVENUE BUSINESS IMPROVEMENT DISTRICT 2005 OPERATING PLAN

I. INTRODUCTION

In 1984, the Wisconsin legislature created Sec. 66.608 of the Statutes enabling cities to establish Business Improvement Districts (BIDs) upon the petition of at least one property owner within the proposed district. The purpose of the law is ". . .to allow businesses within those districts to develop, manage and promote the districts and to establish an assessment method to fund these activities." Upon petition from property owners within the West 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 North Avenue) and adopted its initial operating plan.

Section 66.608 (3) (b), Wis. Stats., requires that a BID Board "shall annually consider and make changes to the operation plan. . .The board shall then submit the operating plan to the local legislative body for approval." The Board of BID No. 16 (Uptown Crossing Business District) submits this 2005 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 2005. 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 60th Street and West Lisbon Avenue North 45th Street Westbound to North 52nd Street. A listing of the 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 2005 will include, but are not limited to:

- 1) Monitoring the continued installation and implementation of the streetscape improvements. Five Hundred Thousand Dollars of additional major improvements, which was approved in 2002, should be installed yet in 2004. This additional expense is part of a new contract BID 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, including four (4) seasonal changes.

- 5) Via involvement other community resources investigate avenues to facilitate economic development opportunities and activities including management of BID functions.

C. Proposed Expenditures

PROJECT BUDGET - 2005

<u>Project Expenses</u>	\$ 45,000.00
Debt expense	
<u>Operating Expenses</u>	
- Insurance	2,000.00
- Ongoing street maintenance (may include, but is not limited to replacement of damaged street amenities and street trees, as necessary; graffiti removal; and landscape maintenance)	17,000.00
<u>Seasonal Decorations</u>	3,500.00
<u>General Expenses</u>	
- photocopies, postage, etc.	500.00
<u>New contracted or hired services</u>	<u>20,000.00</u>
TOTAL	\$ 88,000.00

* The streetscape project was initiated in September 1996. In 2004, we will undertake another major project to change out the cobra street lighting to match the pedestrian level lighting. Project costs have been approved for approximately \$500,000. It is unclear if this assessment will be part of the 2005 budget. This is a matching grant project with 50% paid by the BID and 50% paid by the city.

The district also will expend funds for maintenance of the streetscape project and the direct operation of the district. Some of these funds will be unspent funds carried over from previous years' BID assessments.

The BID Board will have the authority and responsibility to prioritize expenditures and to revise the district budget as necessary to match the funds actually available. Any funds unspent at the end of 2003 shall be carried over to 2004 and applied against future expenses. It is estimated that the BID will carry forward approximately \$75,000 of currently held funds for future expenses.

D. Financing Method

It is proposed that the City of Milwaukee and the district jointly and cooperatively fund the streetscaping. The district's share of the cost of the streetscaping and the operating expenses of the district will be funded by BID assessments on taxable properties within the district.

The district entered into a Public Improvement Development and Maintenance Agreement, identified as Contract No. 96-239 (CM), dated April 2, 1997, with the City of Milwaukee.

The Public Improvement Development and Maintenance Agreement constitutes a long-term commitment and the district will not be terminated until all repayments to the City have been made and adequate provision is made for the operation and management of the improvements financed through the district. The Public Improvement Development and Maintenance Agreement is in addition to this operating plan.

The new contract for 2004 will be similar in nature to the current contract.

V. METHOD OF ASSESSMENT

A. Assessment Rate and Method

As of June 2, 2003, the properties in the district had a total assessable value of \$15,624,400.00. 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 \$1000 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. Stats., 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.
- 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 1st of each plan year, provide the Board, through the Tax Commissioner's Office, with the official City records on the assessed value of each tax key number within the district as of January 1st of each plan year for the 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:

- Juergen Harter
Property owner, North Avenue location
- Jill Trachte,
Property owner, business owner, North Avenue Location,
- Christine McRoberts,
Property owner, business owner, North Avenue location
- Gordon Steimle
Neighborhood resident, Washington Heights location
- Allyson Nemec
Neighborhood resident, Westside of Milwaukee
- Barbara Szymanski
Neighborhood resident, Washington Heights 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 the BID Board. In accordance with this plan, the Association may contract 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 2005 activities. Information on specific assessed values, budget amounts, and assessment amounts are based on 2004 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.

APPENDIX A: 2004 Assessed Values and BID Assessments - BID-16 (West North Ave.), Sorted by Tax Key

Tax Key No.	Ck Dg	Address	Owner	Property Value	In/Ex	Assessable Value	BID Assessment
3290248000	4	5522 W NORTH	H DUCK INC	\$198,000	1	\$198,000	\$1,039.50
3290249110	3	5516 W NORTH	AS NEW APPLIANCES INC	\$248,000	1	\$248,000	\$1,302.00
3290542000	2	5114 W LISBON	LEONA J SMITH DBA	\$49,000	1	\$49,000	\$257.25
3290911100	4	5428 W NORTH	FAMILY DOLLAR STORES OF WI	\$599,500	1	\$599,500	\$3,147.38
3291012000	9	5710 W NORTH	5714 REL EST HOLDINGS LLC	\$63,800	1	\$63,800	\$334.95
3291882000	X	5104 W LISBON	WILHELM COMMERCIAL HOLDING	\$12,800	1	\$12,800	\$67.20
3299991100	4	5722 W NORTH	R A EVANS LLC	\$168,000	1	\$168,000	\$882.00
3460115000	1	5725 W NORTH	HALL INVESTMENT GROUP LLC	\$120,900	1	\$120,900	\$634.73
3460126100	8	5803 W NORTH	PAUL R ORWAL	\$100,000	1	\$100,000	\$525.00
3460141000	3	5823 W NORTH	HANI MATLOUB AND BRENDA S	\$57,100	1	\$57,100	\$299.78
3460142100	5	5901 W NORTH	KEREN PROPERTIES 4 LLC	\$58,800	1	\$58,800	\$308.70
3460142200	1	5909 W NORTH	ELWYN O JARVIS	\$54,800	1	\$54,800	\$287.70
3460166000	X	2255 N 54TH	KEREN PROPERTIES 4 LLC	\$146,000	1	\$146,000	\$766.50
3460501000	X	5419 W NORTH	WALTER RASNER JR & JUDY HW	\$98,900	0	\$48,900	\$256.73
3460523000	X	5501 W NORTH	ROBERT C PRESCHER	\$62,000	1	\$62,000	\$325.50
3461401000	4	5507 W NORTH	GEORGE O HARTTER &	\$97,300	1	\$97,300	\$510.83
3461402000	X	5511 W NORTH	JEANETTE MALONE	\$171,000	1	\$171,000	\$897.75
3461403000	5	5517 W NORTH	CATHERINE PRETCHOLD	\$86,900	1	\$86,900	\$456.23
3461404000	0	5523 W NORTH	LINCOLN FONG	\$122,000	1	\$122,000	\$640.50
3461405000	6	5527 W NORTH	MICHAEL R MARBLE	\$91,600	1	\$91,600	\$438.90
3461406000	1	5601 W NORTH	VIKTORIYA SHTEYNBUK	\$83,600	1	\$83,600	\$438.90
3461423000	4	5609 W NORTH	RONALD W BARCHUS	\$182,000	1	\$182,000	\$955.50
3461424000	X	5611 W NORTH	GOJO PELICARIC	\$52,300	1	\$52,300	\$274.58
3461425000	5	5629 W NORTH	INSTA-TAX SERVVS INC	\$96,200	1	\$96,200	\$505.05
3461426000	0	5701 W NORTH	JACK RABON	\$75,600	1	\$75,600	\$396.90
3461427000	6	5707 W NORTH	DONALD CONSTANTINEAU	\$172,000	1	\$172,000	\$903.00
3461444000	9	5713 W NORTH	DAVID J HAAS	\$146,000	1	\$146,000	\$766.50
3461445000	4	5101 W NORTH	ROSEMARIE DUNHAM REVOC TR	\$188,000	1	\$188,000	\$987.00

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Tax Key No.	Ck Dg	Address	Owner	Property Value	In/Ex	Assessable Value	BID Assessment
3461604000	8	5119 W NORTH	ELLEN N AHNERT	\$68,400	1	\$68,400	\$359.10
3461605000	3	5125 W NORTH	KOSTAS P DEMOPOULOS	\$134,000	1	\$134,000	\$703.50
3461606000	9	5129 W NORTH	REAL ESTATE ROESOLUTIONS	\$199,900	1	\$199,900	\$1,049.48
3461623000	1	5211 W NORTH	MELVIN B RASKIN	\$73,800	1	\$73,800	\$387.45
3461624000	7	5205 W NORTH	FUTURE HEIGHTS LLC	\$87,300	1	\$87,300	\$458.33
3461625000	2	5201 W NORTH	LISA A GELHAAR AND	\$74,200	1	\$74,200	\$389.55
3469974000	6	5311 W NORTH	FREYA ALVARADO LLC	\$83,000	1	\$83,000	\$435.75
3470207000	9	4503 W NORTH	BRIAN M MONROE &	\$175,000	1	\$175,000	\$918.75
3470208000	4	4517 W NORTH	CLEO BURNS BOST	\$73,000	1	\$73,000	\$383.25
3470209100	6	4525 W NORTH	CFSC PROPERTIES LLC	\$344,000	1	\$344,000	\$1,806.00
3470213000	1	4538 W LISBON	RALPH E NEELY	\$42,800	1	\$42,800	\$224.70
3470214000	7	4530 W LISBON	ELROY CADE	\$3,600	1	\$3,600	\$18.90
3470215000	2	4522 W LISBON	CORINNE SCHEFFLER	\$7,200	1	\$7,200	\$37.80
3470216000	8	4518 W LISBON	VICTORIA C OCHI	\$43,200	1	\$43,200	\$226.80
3470225000	7	4601 W NORTH	LISBON COMMUNITY DEVEL.	\$3,100	1	\$3,100	\$16.28
3470226000	2	4607 W NORTH	LISBON COMMUNITY DEVEL.	\$4,300	0	\$4,300	\$22.58
3470227000	8	2247 N 46TH	LISBON COMMUNITY DEVEL.	\$4,800	0	\$4,800	\$25.20
3470229100	5	4604 W LISBON	LISBON COMMUNITY DEVEL.	\$12,300	0	\$12,300	\$64.58
3470301000	X	4733 W NORTH	NP PROPERTIES LLC	\$60,300	1	\$60,300	\$316.58
3470302000	5	4729 W NORTH	AHMAD BAHRAMI MOGAHDAM	\$48,000	1	\$48,000	\$252.00
3470321000	9	2238 N 48TH	AHMAD BAHRAMI MOGAHDAM	\$7,200	1	\$7,200	\$37.80
3470323121	9	4623 W LISBON	FIRST MIL BANK	\$330,000	1	\$330,000	\$1,732.50
3470336000	0	4527 W LISBON	KAHIN CORPORATION	\$253,500	1	\$253,500	\$1,330.88
3470708000	2	4401 W NORTH	4401 NORTH AVENUE LLC	\$17,000	1	\$17,000	\$89.25
3470709000	8	4415 W NORTH	K.B.T.C.S., INC	\$56,100	1	\$56,100	\$294.53
3470710000	3	4419 W NORTH	KEITH B TERRY	\$72,300	1	\$72,300	\$379.58
3470711000	9	4425 W NORTH	MICHAEL S WISNIEWSKI	\$79,200	1	\$79,200	\$415.80
3470911000	6	4321 W NORTH	COMMUNITY BAPTIST CHURCH	\$4,900	1	\$4,900	\$25.73
3470912000	1	2246 N 44TH	NORTH AVENUE INVESTMENTS	\$52,000	1	\$52,000	\$273.00
3470913000	7	4319 W NORTH	NORTH AVENUE INVESTMENTS	\$49,400	1	\$49,400	\$259.35

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3471001000	7	4807 W NORTH	S PRICE REAL ESTATE HOLDINGS	\$186,000	1	\$186,000	\$976.50
3471019000	5	4815 W NORTH	JAMES E SMITH	\$72,600	1	\$72,600	\$381.15
3471020000	0	4823 W NORTH	TOPITZES PROPERTIES LLC	\$186,000	1	\$186,000	\$976.50
3471042000	0	4919 W NORTH	CHRISTINE MCROBERTS	\$90,400	1	\$90,400	\$474.60
3471044000	1	5019 W NORTH	D P INVESTMENT COMPANY	\$147,000	1	\$147,000	\$771.75
3479992000	1	5027 W NORTH	RICHARD W HERZFELD	\$106,000	1	\$106,000	\$556.50
3479993100	3	5033 W NORTH	JOHN H KOSTECKI	\$80,200	1	\$80,200	\$421.05
3479997000	9	4801 W NORTH	S PRICE REAL ESTATE HOLDINGS	\$439,000	1	\$439,000	\$2,304.75
TOTALS:				\$15,624,400	93	\$15,624,400	\$81,624.38

Total Bid Assessment \$77,033.25

EXCLUSIVELY RESIDENTIAL OR TAX-EXEMPT PROPERTY INCLUDED IN THE DISTRICT BUT NOT ASSESSED:

3280116000	9	2371 N 49TH	EL TARIQ RAJ IBN RAHMAN	\$85,000	0	\$0	\$0.00
3280119000	5	4811 W LISBON	REDEVELOPMENT AUTHORITY	\$0	1	\$0	\$0.00
3280633000	X	4414 W NORTH	KEITH B TERRY	\$48,000	0	\$0	\$0.00
3280635000	0	4424 W NORTH	CHARLES BAGNIESKI	\$104,400	0	\$0	\$0.00
3280636000	6	4428 W NORTH	CITY OF MILWAUKEE	\$0	9	\$0	\$0.00
3281209100	9	4820 W LISBON	ALPHA WOMEN'S CENTER INC.	\$0	1	\$0	\$0.00
3281257000	4	2309 N 46TH	LUCILLE E MUSTA	\$55,900	0	\$0	\$0.00
3281258000	X	2303 N 46TH	JAMES E & DOROTHY N ROUSE	\$60,900	0	\$0	\$0.00
3281908100	9	2429 N 50TH	GREG D MOTTO	\$85,500	0	\$0	\$0.00
3282102000	9	4914 W LISBON	MILW REDEVELOP AUTHORITY	\$0	1	\$0	\$0.00
3282131000	7	4923 W LISBON	CITY OF MILWAUKEE	\$0	1	\$0	\$0.00
3291301000	X	5105 W LISBON	HOUSING AUTH CITY OF MILW	\$0	1	\$0	\$0.00
3461603000	2	5115 W NORTH	BARRY D DIMOFF	\$118,200	0	\$0	\$0.00
3470211000	0	2236 N 46TH	LISBON/FORTYSIXTH LTD	\$74,400	0	\$0	\$0.00

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Tax Key No.	Ck Dg	Address	Owner	Property Value	In/Ex	Assessable Value	BID Assessment
3470212000	6	2230 N	MARK A WAMSER	\$55,300	0	\$0	\$0.00
3470217000	3	4500 W	GARFIELD CITY OF MILW	\$0	0	\$0	\$0.00
3470218000	9	4510 W	LISBON CITY OF MILW	\$0	0	\$0	\$0.00
3470227000	8	2247 N	LISBON COMMUNITY DEVEL	\$4,800	0	\$0	\$0.00
3470303000	0	4719 W	NORTH CITY OF MILWAUKEE	\$0	1	\$0	\$0.00
3470304000	6	4701 W	LISBON CITY OF MILW	\$0	1	\$0	\$0.00
3471021000	6	2257 N	THEODIE D FREEMON SR	\$85,000	0	\$0	\$0.00
3471041000	5	2252 N	HI MOUNT CHARLES A BAURES &	\$104,300	0	\$0	\$0.00
3471043000	6	5009 W	NORTH RICHARD ZANONI AND MARY JEAN	\$136,200	0	\$0	\$0.00
TOTAL:				\$1,017,900			