

BUSINESS IMPROVEMENT DISTRICT NO. 4

GREATER MITCHELL STREET

OPERATING PLAN FOR YEAR 2017 (YEAR 28)

9/13/2017

## TABLE OF CONTENTS

- I. Introduction
- II. District Boundaries
- III. Proposed Operating Plan
- IV. Method of Assessment
- V. Relationship to Milwaukee Comprehensive Plan and Orderly Development of the City
- VI. Plan Approval Process
- VII. Future Year's Operating Plans

### Appendices:

- A. BID Map
- B. Listing of Current BID #4 Board of Directors
- C. Projected Assessments for 2017 Operating Plan
- D. BID #4's 2016-2017 Annual Report
- E. BID State Statute
- F. BID #4 2015 Audited Financial Statements

## I. INTRODUCTION

### A. Background - History

In 1984, the Wisconsin legislature created 66.1109 (formerly S. 66.608) of the Statutes (see Appendix A) enabling cities to establish Business Improvement Districts (BIDs). 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 Wisconsin Act 184, Section 1, legislative declaration.)

The City of Milwaukee has received a petition from property owners which requested creation of a Business Improvement District for the purpose of revitalizing and improving the Mitchell Street business area on Milwaukee's near south side. BID #4 was established in 1989. The BID law requires that every district have an annual Operating Plan. This document is the Operating Plan for the Mitchell Street Business Improvement District #4. The BID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

### B. Physical Setting

The area is a retail and commercial, and densely populated, District on the near south side of the City of Milwaukee, and includes the Historic Mitchell Street commercial corridor.

## II. DISTRICT BOUNDARIES

BID #4 was established to support the commercial and business interests of the Mitchell Street commercial corridor. It oversees an area of fourteen plus blocks, representing approximately 100 business owners on the near south side of the City. A listing of the properties included in the District is part of this 2017 Operating Plan.

## III. PROPOSED OPERATING PLAN

### A. Plan Objectives

The mission and objectives of the BID are to: Continue the revitalization and improvement of the retail shopping and business district as a shopping destination; to further economic development initiatives by providing coordinated resources for businesses on the Mitchell Street commercial corridor; to advocate and create positive solutions for business and commercial issues; and to increase the number and variety of businesses in this district on Milwaukee's near south side. The BID also strives to remain culturally relevant to the ethnically diverse enterprises in the District. The BID's specific initiatives are maintaining a clean, safe and friendly business neighborhood, and the promotion of destination shopping for its merchants and businesses on the commercial corridor.

### B. Proposed Activities

Principle goals and activities to be engaged in by the District during its twenty-eighth year of operation will include: Maximizing both human and capital resources in the promotion and

implementation of activities that will result in enhanced safety for the business and residential area; improving the area's image and esthetics; increased property values; and the following:

- a. Continue to coordinate efforts to complete an overall design plan, including capital improvements, safe traffic control, and parking lot utilization. Initiate a new branding for the commercial corridor to further identify it to potential businesses and developers.
- b. Providing assistance to property owners and developers who are engaged in property improvements and redevelopment activities.
- c. Promoting the unique historic significance and commercial mix of the District.
- d. Encouraging design-sensitive renovations of buildings in the District and not allow security bars and grills on commercial frontage.
- e. Ensuring all commercial buildings within the District to be maintained graffiti-free with the supporting City graffiti removal program.
- f. Providing support and/or financial assistance to businesses that are engaging in activities that meet the BID's overall objectives. A potential third party loan program is being studied.
- g. Continuing to implement, coordinate and support positive activities and events which enhance retail and business recruitment and retention, and property owners' interests.
- h. Maintaining the neighborhood business district portfolio, including an inventory of commercial space availability for distribution to brokers and prospective tenants and to respond to inquiries from developers.
- i. Continue to work closely with the Milwaukee Police Department and District 2 for increased police protection and support, along with security measures and safety programs for a safe business and residential neighborhood. BID #4 now also has an active and involved Safety Committee comprised of Board members and neighborhood volunteers.
- j. Coordinate publicity and media coverage of District activities.
- k. Initiate, plan, coordinate and implement continuous events and activities for property owners, businesses and merchants, i.e., the annual 3-day Sun Fair on Historic Mitchell Street.
- l. Support a community outreach program linking the business community to the community at large and to City of Milwaukee services and programs.
- m. Distribution of timely information to property owners, businesses and other interested parties via Newsletters, flyers, letters, resource seminars, and other appropriate methods.
- n. Assisting in TID #71 continuing activities if/where feasible.
- o. Maintaining the organized business Neighborhood Block Watch, with the assistance of MPD District 2, to enhance safety and security in the BID #4 district.
- p. Continue to sponsor and promote special events (i.e., the annual Sun Fair and "Holidays on Mitchell Street"), and initiate new events (i.e., "Mitchell Street Days") that promote the retail area and draw returning and new destination shoppers to the commercial corridor.
- q. Maintaining cleanliness of the commercial corridor, and maintaining the medians and streetscaping on Historic Mitchell Street.
- r. Enforcing the historical guidelines for Historic Mitchell Street, working closely with the City of Milwaukee Historic Preservation Commission.

C. Proposed Expenditures and Income

Proposed Expense Budget for 2017:

Business Development	3550
Marketing & Promotion	3414
Safety and Security	617
Graffiti Removal	2753
Meeting Expenses	924
Street Maintenance	6950
Office Expenses	2250
Rent	9000
Telephone/Internet	2292
Postage	600
Utilities	-0-
Repairs & Maintenance	1075
Miscellaneous	345
Legal & Professional Services	9000
Insurance	2196
Community Outreach	1000
Personnel	67384

Total Expense Budget for 2017: 113,350

Proposed Income Budget for 2017: 126,659

D. Financing Method

It is proposed to raise \$119,071 from 100 commercial properties, through BID assessments (see Appendix D) and we project that the 2017 Sun Fair will net \$6500. While the 2017 budgeted expenses are less than the anticipated BID assessments, we expect to rebuild the reserve dollars that were used in the last couple of years. The BID Board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available. The BID is required to conduct an independent audit each year which is submitted to the City of Milwaukee. A print copy of the audit is also available at the BID's office for public perusal.

E. Organization of a BID Board

Upon creation of the BID, the Mayor appoints members to the District board ("board"), who are approved by the Common Council. The board's primary responsibility will be implementation of this Operating Plan. This will require the board and staff to negotiate with providers of services and

materials to carry out the Plan; to enter into 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 overpayments of BID assessments. The Plan serves as the guide for the following year's activities.

State law requires that the board be composed of at least five members and that a majority of the board members be owners or occupants of property within the District.

The BID #4 Board of Directors is structured and operates as follows:

1. Board Size - Fifteen
2. Composition - At least eight members (majority) shall be owners or occupants of property and/or businesses within the district. Any non-owner or non-occupant appointed to the board shall be a resident of the City of Milwaukee. The board shall elect its President, Vice President, Treasurer and Secretary from among its members, at its annual Board meeting every January.
3. Term - Appointments to the board shall be for a period of three years except that initially two members shall be appointed for a period of three years, two members shall be appointed for a period of two years, and one member shall be appointed for a period of one year.
4. Compensation – None
5. Meetings - All meetings of the board shall be governed by the Wisconsin Open Meetings Law.
6. Record Keeping - Files and records of the board's affairs shall be kept pursuant to public record requirements.
7. Staffing - The board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof.
8. Meetings - The board shall meet regularly, at least twice each year; however, the Board does, at the present time, meet monthly. The board shall adopt rules of order ("By- Laws") to govern the conduct of its meeting. Standing committees meet as needed, with reporting to the Board at the monthly Board meetings. A new Finance committee has been created and meets quarterly.

#### 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. 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 BID. Therefore, a fixed assessment on the assessed value of the property was selected as the basic assessment methodology for this BID.

However, maintaining an equitable relationship between the BID assessment and the expected benefits requires an adjustment to the basic assessment method. To prevent the disproportional assessment of a small number of high value properties, a maximum assessment of \$2500.00 per parcel will be applied.

As of January 1, 2016, the property in the district had a total assessed value of \$52,770,400 million. The plan's creation assesses the commercial property in the District at a rate of \$4.00 per \$1,000.00 of assessed value, subject to the maximum assessment, for the purposes of the BID. Taxable properties, other than those classified as parking lots or vacant lots, are subject to a \$400.00 minimum BID assessment. Taxable parcels are subject to a maximum of \$2,500.00 BID assessment.

Appendix D provides the projected BID assessment for each property included in the District.

#### 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. State Statute 66.608(1)(f)1m: 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 66.608(5)(a): Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix D, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding State Statute 66.608(1)(b), 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.

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

#### A. City Plans

In February 1978, the Common Council of the City of Milwaukee adopted a Preservation Policy as the policy basis for its Comprehensive Plan and as a guide for its planning, programming and budgeting decisions. The Common Council reaffirmed and expanded the Preservation Policy in Resolution File Number 881978, adopted January 24, 1989.

The Preservation Policy emphasizes maintaining Milwaukee's present housing, jobs, neighborhoods, services, and tax base rather than passively accepting loss of jobs and population, or

emphasizing massive new development. In its January 1989 reaffirmation of the policy, the Common Council gave new emphasis to forging new public and private partnerships as a means to accomplish preservation.

The district is a means of formalizing and funding the public-private partnership between the City and property owners in the Mitchell Street business area and for furthering preservation and redevelopment in this portion of the City of Milwaukee. Therefore, it is fully consistent with the City's Comprehensive Plan and Preservation Policy.

#### B. 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 is 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:

1. Provide technical assistance to the proponents of the district through adoption of the Plan, and provide assistance as appropriate thereafter.
2. Monitor and, when appropriate, apply for outside funds that could be used in support of the district.
3. Collect assessments, maintained in a segregated account, and disburse the monies for the maintenance of the business district.
4. Have prepared an annual audit for the City as required per sec. 66.1109(3)(c) of the BID law.
5. Provide the Board, through the City's Treasurer's Office by a designated date of each Plan year, with the official City records and the assessed value of each tax key number within the district, as of January 1<sup>st</sup> of each Plan year, for purposes of calculating the BID assessments.
6. Encourage and work with the State of Wisconsin, Milwaukee County and other units of government to support the activities of the District.

## VI. PLAN APPROVAL PROCESS

### A. Public Review Process

The Wisconsin Business Improvement District law establishes a specific process for reviewing and approving proposed districts. Pursuant to the statutory requirements, the following process will be followed:

1. The Milwaukee City Plan Commission will review the proposed district boundaries and proposed Operating Plan and will then set a date for a formal public hearing.
2. The City Plan Commission will send, by certified mail, a public hearing notice and a copy of the proposed Operating Plan to all owners of real property within the



proposed district. In addition a Class 2 notice of the public hearing will be published in a local newspaper of general circulation.

3. The City Plan Commission will hold a public hearing, will approve or disapprove the Plan, and will report its action to the Common Council.
4. The Economic Development Committee of the Common Council will review the proposed BID Plan at a public meeting and will make a recommendation to the full Common Council.
5. The Common Council will act on the proposed BID Plan.
6. If adopted by the Common Council, the proposed BID Plan is sent to the Mayor for his approval.
7. If approved by the Mayor, the BID is created and the Mayor will appoint members to the district board established to implement the Plan.

## VII. FUTURE YEAR'S 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 this initial Operating Plan.

Section 66.1109 (3) (a) of the BID law requires the Board and the City to annually review and make changes as appropriate in the Operating Plan. Greater detail about subsequent year's activities will be provided in the required annual Operating Plan and Annual Report, and approval by the Common Council of such Plan updates shall be conclusive evidence of compliance with this Plan and the BID law.

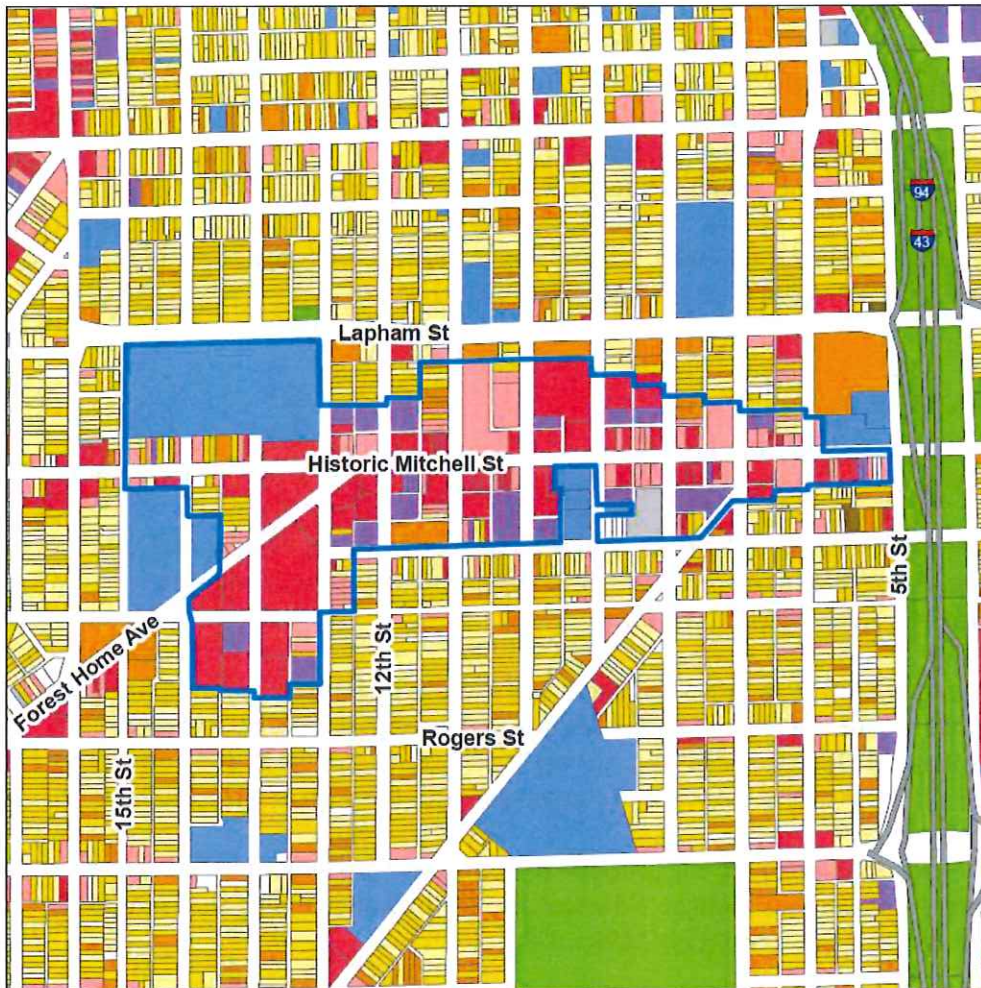
In continuing years, the BID Operating Plan will continue to apply the assessment formula, as adjusted, to raise funds to meet the next annual budget. However, the method of assessing shall not be materially altered, except with the consent of the City of Milwaukee.

### B. Amendment, Severability and Expansion

This BID has been created under authority of Section 66.1109 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 Plan shall be amended to conform to the law without need of reestablishment.

Should the legislature amend the Statute to narrow or broaden the process of a BID so as to exclude or include 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 Section 66.1109(3)(b).

APPENDIX A  
 BID Map

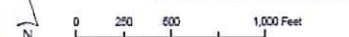


**Business Improvement District  
 No. 4 (Greater Mitchell Street)**

**Land Use**

- BID Boundary
- Residential**
  - Single Family
  - Duplex
  - Multi-Family
  - Condominiums
- Commercial**
  - Commercial
  - Mixed Commercial and Residential
- Manufacturing, Construction,  
 and Warehousing**
  -
- Transportation, Communications,  
 and Utilities**
  -
- Public and Quasi-Public**
  - Public Parks and Quasi-Public Open Space
  - Public Schools and Buildings, Churches, Cemeteries, and Quasi-Public Buildings
- Vacant Land or Recent Taxkey Change**
  -

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APPENDIX B  
Listing of Current BID #4 Board of Directors

<u>Name</u>	<u>Title</u>	<u>Term Start Date</u>	<u>Term End Date</u>
Jesus Nanez	President	05/01/15	05/01/18
Dimity Grabowski	Vice President	02/25/14	02/25/17
Milton Pivar	Treasurer	06/06/14	06/06/17
Demitra Copoulos*	Secretary	09/09/13	09/09/16
Amrit Patel	Board Member	07/27/15	07/27/18
Gloria Marquez	Board Member	07/05/16	07/05/19
Juan Ordaz	Board Member	07/28/14	07/28/17
John Dye	Board Member	03/12/15	03/12/18
Alex Fuentes*	Board Member	06/20/13	06/20/16
Joseph Arnezeder	Board Member	02/13/14	02/13/17
David Rotter	Board Member	11/07/14	11/07/17
Augustin Garnica	Board Member	03/18/15	03/18/18
Raul Gutierrez	Board Member	10/21/15	10/21/18
Vacant Board Seat	Board Member		
Vacant Board Seat	Board Member		

As of 8/31/2016, two vacancies exist on the Board

*\*Currently undergoing Board Term Renewal Nomination Process*

APPENDIX C  
 BID 2017 Projected Assessments for 2017 Operating Plan

Taxkey	Address	Total Assessment	BID #4 Assessment 2017
4600101110	1300 W HISTORIC MITCHELL	\$1,088,000	\$2,500
4600113100	1301 W FOREST HOME	\$38,400	\$154
4600115110	1337 W FOREST HOME	\$1,740,000	\$2,500
4600118100	1905 S 13TH	\$90,000	\$400
4600120000	1915 S 13TH	\$62,000	
4600121000	1919 S 13TH	\$128,900	\$516
4600122000	1925 S 13TH	\$48,900	
4600123110	1937 S 13TH	\$47,300	\$189
4600123120	1331 W BURNHAM	\$900,000	\$2,500
4600123130	1940 S 14TH	\$283,200	\$1,133
4600301100	1841 S 14TH	\$447,000	\$1,788
4600303000	1416 W FOREST HOME	\$79,600	\$400
4600304000	1412 W FOREST HOME	\$78,500	\$400
4600305000	1406 W FOREST HOME	\$1,700	\$7
4600306000	1400 W FOREST HOME	\$80,100	\$400
4600307000	1741 S 14TH	\$40,700	
4600308100	1737 S 14TH	\$50,100	
4600308200	1737 S 14TH	\$18,600	
4600309000	1733 S 14TH	\$72,500	
4600310000	1729 S 14TH	\$37,200	
4600311000	1725 S 14TH	\$50,900	
4600312000	1721 S 14TH	\$65,000	
4600313000	1719 S 14TH	\$38,500	
4600315100	1401 W MITCHELL	\$821,000	\$2,500
4601032000	1500 W MITCHELL	\$156,000	\$624
4601033000	1504 W MITCHELL	\$52,400	
4601034000	1510 W MITCHELL	\$7,400	\$30
4601035000	1512 W MITCHELL	\$28,400	
4601036000	1516 W MITCHELL	\$9,800	\$39
4601037000	1522 W MITCHELL	\$139,900	
4601038000	1524 W MITCHELL	\$58,600	
4601040100	1532 W MITCHELL	\$126,500	\$506
4601041000	1670 S 15TH	\$39,400	
4601042000	1666 S 15TH	\$30,800	
4601060000	1400 W MITCHELL	\$113,000	\$452
4601061000	1404 W MITCHELL	\$87,800	\$400
4601062000	1408 W MITCHELL	\$53,900	
4601063100	1418 W MITCHELL	\$494,600	

APPENDIX C  
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4601065000	1424 W MITCHELL	\$66,900	
4601066000	1430 W MITCHELL	\$0	
4601068100	1436 W MITCHELL	\$209,000	\$836
4601212110	1321 W LAPHAM	\$0	
4601861100	1302 W FOREST HOME	\$2,000,000	\$2,500
4610502100	621 W HISTORIC MITCHELL	\$1,417,000	\$2,500
4610503000	635 W HISTORIC MITCHELL	\$135,000	\$540
4610528000	715 W HISTORIC MITCHELL	\$18,500	\$74
4610530000	709 W HISTORIC MITCHELL	\$152,000	\$608
4610531000	705 W HISTORIC MITCHELL	\$198,000	\$792
4610534100	716 W WINDLAKE	\$0	
4610537100	734 W WINDLAKE	\$52,100	
4610538000	728 W MAPLE	\$49,100	
4610539000	732 W MAPLE	\$58,900	\$400
4610540000	738 W MAPLE	\$117,000	\$468
4610541000	733 W HISTORIC MITCHELL	\$319,000	\$1,276
4610542000	729 W HISTORIC MITCHELL	\$108,000	\$432
4610544100	723 W HISTORIC MITCHELL	\$214,000	\$856
4610545000	801 W HISTORIC MITCHELL	\$252,000	\$1,008
4610546000	807 W HISTORIC MITCHELL	\$365,000	\$1,460
4610547000	815 W HISTORIC MITCHELL	\$117,000	\$468
4610548000	829 W HISTORIC MITCHELL	\$1,344,000	\$2,500
4610549000	833 W HISTORIC MITCHELL	\$505,000	\$2,020
4610550110	1718 S 9TH	\$44,000	\$176
4610554000	836 W MAPLE	\$4,700	
4610555000	832 W MAPLE	\$2,700	
4610556000	828 W MAPLE	\$5,100	
4610557000	824 W MAPLE	\$4,700	
4610562110	800 W MAPLE	\$849,100	\$2,500
4610570000	929 W HISTORIC MITCHELL	\$477,000	\$1,908
4610572100	939 W HISTORIC MITCHELL	\$1,002,000	\$2,500
4610576110	930 W MAPLE	\$0	
4610583000	1003 W HISTORIC MITCHELL	\$311,000	\$1,244
4610584000	1009 W HISTORIC MITCHELL	\$123,000	\$492
4610585000	1013 W HISTORIC MITCHELL	\$111,000	\$444
4610586000	1017 W HISTORIC MITCHELL	\$146,000	\$584
4610587100	1023 W HISTORIC MITCHELL	\$167,800	\$671
4610590000	1029 W HISTORIC MITCHELL	\$123,000	\$492
4610592100	1039 W HISTORIC MITCHELL	\$1,051,000	\$2,500
4610595100	1726 S 11TH	\$435,000	\$1,740
4610598000	1038 W MAPLE	\$0	

APPENDIX C  
 BID 2017 Projected Assessments for 2017 Operating Plan

4610599000	1032 W MAPLE	\$11,200	\$45
4610600000	1028 W MAPLE	\$45,500	
4610601000	1026 W MAPLE	\$24,300	
4610602000	1022 W MAPLE	\$72,900	\$400
4610603100	1002 W MAPLE	\$0	
4610604000	1101 W HISTORIC MITCHELL	\$811,000	\$2,500
4610605000	1117 W HISTORIC MITCHELL	\$157,000	\$628
4610606000	1125 W HISTORIC MITCHELL	\$30,800	\$123
4610607000	1129 W HISTORIC MITCHELL	\$13,900	\$56
4610608000	1135 W HISTORIC MITCHELL	\$302,000	\$1,208
4610609100	1718 S 12TH	\$69,300	\$277
4610610110	1740 S 12TH	\$150,000	
4610616000	1733 S 11TH	\$24,800	
4610617000	1729 S 11TH	\$0	
4610618000	1725 S 11TH	\$0	
4610619100	1201 W HISTORIC MITCHELL	\$312,000	\$1,248
4610620110	1213 W HISTORIC MITCHELL	\$498,000	\$1,992
4610621110	1715 S 12TH	\$200,000	\$800
4610622100	1730 S 13TH	\$302,000	\$1,208
4610623000	1742 S 13TH	\$33,500	
4610624000	1744 S 13TH	\$25,200	\$101
4610625000	1747 S 12TH	\$0	
4610635000	1220 W BURNHAM	\$0	
4610636000	1830 S 13TH	\$123,000	\$492
4610637000	1828 S 13TH	\$63,000	\$400
4610638000	1824 S 13TH	\$68,900	\$400
4610639000	1820 S 13TH	\$116,000	\$464
4610640000	1816 S 13TH	\$78,700	\$400
4610641000	1812 S 13TH	\$83,400	\$400
4610642000	1810 S 13TH	\$44,900	
4610643000	1800 S 13TH	\$86,600	\$400
4610644000	1227 W MAPLE	\$39,500	
4610645000	1219 W MAPLE	\$4,900	
4611307110	1657 S 12TH	\$0	
4611311000	1202 W HISTORIC MITCHELL	\$639,000	\$2,500
4611312000	1216 W HISTORIC MITCHELL	\$128,000	\$512
4611313000	1222 W HISTORIC MITCHELL	\$166,000	\$664
4611314000	1226 W HISTORIC MITCHELL	\$239,000	\$956
4611315000	1662 S 13TH	\$97,300	\$400
4611334000	1619 S 11TH	\$36,200	
4611335000	1623 S 11TH	\$35,800	

APPENDIX C  
 BID 2017 Projected Assessments for 2017 Operating Plan

4611336000	1629 S 11TH	\$54,200	
4611337000	1633 S 11TH	\$68,100	
4611338000	1639 S 11TH	\$54,500	
4611339000	1643 S 11TH	\$53,700	
4611340000	1647 S 11TH	\$48,700	
4611341000	1651 S 11TH	\$0	
4611342000	1657 S 11TH	\$55,800	
4611343000	1659 S 11TH	\$87,600	\$400
4611344000	1665 S 11TH	\$141,000	\$564
4611345000	1100 W HISTORIC MITCHELL	\$263,000	\$1,052
4611346000	1104 W HISTORIC MITCHELL	\$0	
4611347000	1108 W HISTORIC MITCHELL	\$111,000	\$444
4611348100	1114 W HISTORIC MITCHELL	\$292,000	\$1,168
4611350000	1122 W HISTORIC MITCHELL	\$420,000	\$1,680
4611351110	1650 S 12TH	\$0	
4611374100	1623 S 10TH	\$70,200	
4611375000	1629 S 10TH	\$146,000	\$584
4611377100	1000 W HISTORIC MITCHELL	\$254,000	\$1,016
4611378110	1020 W HISTORIC MITCHELL	\$4,533,000	\$2,500
4611390111	1643 S 9TH	\$0	
4611396100	910 W HISTORIC MITCHELL	\$1,668,000	\$2,500
4611397100	930 W HISTORIC MITCHELL	\$2,455,000	\$2,500
4611419100	1644 S 9TH	\$0	
4611423110	1654 S 9TH	\$0	
4611426000	802 W HISTORIC MITCHELL	\$0	
4611427000	808 W HISTORIC MITCHELL	\$185,000	\$740
4611428000	812 W HISTORIC MITCHELL	\$106,000	\$424
4611429000	814 W HISTORIC MITCHELL	\$88,900	\$400
4611430000	822 W HISTORIC MITCHELL	\$201,000	\$804
4611431000	828 W HISTORIC MITCHELL	\$126,000	\$504
4611432000	832 W HISTORIC MITCHELL	\$334,000	\$1,336
4611469100	710 W HISTORIC MITCHELL	\$3,073,000	\$2,500
4611470000	720 W HISTORIC MITCHELL	\$134,000	\$536
4611472100	728 W HISTORIC MITCHELL	\$223,000	\$892
4611473000	734 W HISTORIC MITCHELL	\$150,000	\$600
4611474000	1662 S 8TH	\$0	
4611475000	1656 S 8TH	\$451,700	
4611476000	1648 S 8TH	\$81,200	
4611508000	1659 S 6TH	\$63,100	
4611509000	1663 S 6TH	\$95,400	\$400
4611510000	1669 S 6TH	\$47,200	

APPENDIX C  
 BID 2017 Projected Assessments for 2017 Operating Plan

4611511000	1671 S 6TH	\$52,900	
4611512000	600 W HISTORIC MITCHELL	\$109,000	\$436
4611514100	604 W HISTORIC MITCHELL	\$175,000	\$700
4611515000	616 W HISTORIC MITCHELL	\$87,500	\$400
4611516000	620 W HISTORIC MITCHELL	\$50,300	\$400
4611517000	622 W HISTORIC MITCHELL	\$255,000	\$1,020
4611518000	632 W HISTORIC MITCHELL	\$382,000	\$1,528
4611519000	1662 S 7TH	\$19,500	\$78
4611520000	1658 S 7TH	\$15,900	\$64
4611581000	601 W HISTORIC MITCHELL	\$2,485,000	\$2,500
4620625000	501 W HISTORIC MITCHELL	\$264,000	\$1,056
4620626000	507 W HISTORIC MITCHELL	\$6,300	\$25
4620627000	511 W HISTORIC MITCHELL	\$0	
4620628000	515 W HISTORIC MITCHELL	\$112,000	\$448
4620629000	519 W HISTORIC MITCHELL	\$10,400	\$42
4620630000	521 W HISTORIC MITCHELL	\$10,400	\$42
4620631110	529 W HISTORIC MITCHELL	\$392,900	\$1,572
4620634000	539 W HISTORIC MITCHELL	\$91,700	\$400
4620635000	541 W HISTORIC MITCHELL	\$150,000	\$600
4620636100	545 W HISTORIC MITCHELL	\$267,000	\$1,068
4620647000	546 W HISTORIC MITCHELL	\$354,000	\$1,416
4690430120	1931 S 14TH	\$458,000	\$1,832
4690479110	1838 S 15TH	\$859,000	\$2,500
4690480000	1439 W MITCHELL	\$0	
4690481000	1427 W MITCHELL	\$41,900	
4690482000	1423 W MITCHELL	\$72,800	\$400
4690483000	1708 S 15TH	\$74,200	
4690484000	1714 S 15TH	\$45,500	
4690485000	1718 S 15TH	\$39,300	
4690486000	1722 S 15TH	\$52,400	
4690487000	1726 S 15TH	\$55,900	
4690499000	1511 W MITCHELL	\$101,000	\$404
4690500000	1501 W MITCHELL	\$82,300	\$400
4690502000	1533 W MITCHELL	\$152,000	\$608
4690503000	1527 W MITCHELL	\$118,000	\$472
4690504000	1523 W MITCHELL	\$62,900	
4693271000	1433 W BURNHAM	\$2,774,300	\$2,500
4693272000	1901 S 14TH	\$960,000	\$2,500
	<b>Total</b>		<b>\$118,953</b>



APPENDIX D  
BID #4's 2016-2017 Annual Report

**OVERVIEW**

Business Improvement District #4 was organized under Wisconsin State Statute 66.608, and was organized in 1989 for the purpose of *the revitalization of Mitchell Street, between 5th and 15th Streets, on the near south side of the City of Milwaukee*. The purpose and mission of BID #4 is to continue the revitalization and improvements of its Historic Mitchell Street retail district and the commercial corridor and neighborhood, to continue resilient efforts in business retention and recruitment activities, and to maintain a clean and safe business corridor. BID #4 continues to promote Mitchell Street businesses and provide support and services to maintain and expand those businesses. In addition, BID #4 regularly informs all property and business owners of redevelopment activities and the City's historic preservation guidelines, and supports, advocates and creates solutions for its approximately 99 commercial property owners.

**2016 Accomplishments:**

- In order to continue a positive influence on Mitchell Street and the commercial corridor, BID #4 continued to work with the property owners and businesses to renovate retail store fronts and facades, utilizing and providing information on the City's Sign, RIF, White Box and Façade Grant programs
- For the sixth consecutive year, BID #4 again sponsored and operated another successful Sun Fair on Historic Mitchell Street, June 3-5, to again present the spirit of community to the neighborhood, and to continue to attract destination shoppers to the retailers on the Street. The event produced a \$6,000 net profit to add to the 2016 operating budget.
- Continued the planting and maintenance of the treescaping and median landscaping that was updated by the City in 2011 on Historic Mitchell Street, from 5th to 13th Streets; also added new crushed stone around all of the trees on the Street, all to enhance the visual appearance of the commercial corridor.
- Continued on a weekly basis the Street's regular environmental maintenance and cleaning program.
- Promoted the Safe & Sound/MPD surveillance Camera Grant program to area businesses.
- Continued on-going economic development and branding activities to promote the commercial corridor as a thriving area in which to operate retail businesses; this has greatly reduced the number of vacant storefronts on the Street to a small number.
- Continued efforts with a Neighborhood Block Watch program in coordination with MPD District #2 for the safety and security of the district and its businesses. The BID's Safety Committee meets monthly to continue work on safety issues.
- Conducted the annual Fall Open House for retailers, business owners and property owners, which included City departments' representation, other agency and business resources, and other strategic resources.
- Continued, on a daily basis, to monitor graffiti, and maintain the graffiti removal program in the commercial district, in collaboration with the City's DNS Retail Area Graffiti Removal Program.
- Participated with WE Energies to continue a program of no-cost electrical assessments for businesses and property owners to insure electrical usage efficiency.
- Continued efforts to promote public art on the commercial corridor, following the 2014 "Listening to Mitchell" public art installation on Historic Mitchell Street. The project had received very favorable media coverage and interest, with support by merchants and property owners, and sponsorship by BID #4. The BID, for the second year, supported the 2016 "Temporary Resurfacing" public outdoor video art event on Historic Mitchell Street in June. The successful evening event attracted 30 artists with their video art projections, as well as hundreds of attendees.
- Installed an additional 12 new, attractive Ironsites litter containers on Historic Mitchell Street, from 5th to 13th Streets. These join the 10 new containers installed on the Street last year, all to continue to improve and enhance the appearance and cleanliness of the commercial corridor. The project was completed with the use of TIF funds, and they now replace all of the City's older litter containers on the commercial corridor.
- Continued use of the BID's informational marketing pamphlet for Mitchell Street's on-going promotion and economic development activities.

- Coordinated with HMI's "Doors Open Milwaukee" to include, for the third year, three locations in the BID #4 district, for another successful promotional event for the business neighborhood.
- Continued to promote the Me2/3 (Milwaukee Energy Efficiency) and Focus on Energy programs to property owners and businesses.
- Coordinated a fourth annual City of Milwaukee Resource Workshop for property owners and retailers, providing information on the City's grant programs and other available resource programs and services. It included lending information from several financial agencies.
- Continued the Long-Range/Short Range Strategic Planning Committee meetings with Board members, now scheduled throughout the year, for further economic development/retail recruitment activities and initiatives, per the City's Near South Side Area Plan. The Plan was targeted to enhance assets of the area and provide implementation strategies for the future development of the Near South Side.
- Sponsored the annual holiday window-decorating contest for the sixth consecutive year, for retailers and businesses on Mitchell Street. Judging was done by Board members and the Alderman, with the Alderman awarding framed certificates, as well as donated gift certificates to the top three decorated windows.
- Installed for the fifth consecutive year the LED holiday wreath decorations on Historic Mitchell Street's harp light poles; and again sponsored the "Holidays on Mitchell Street" kick-off event and lighting ceremony in November, to promote and increase retail shopping activities for the corridor's merchants and businesses during the busy holiday period.
- Continued to enforce a Neighborhood Zoning Overlay District for Historic Mitchell Street, which was passed by the City Common Council last year. The Plan furthers the BID's mission of "retail-only businesses" on the street level of the commercial corridor.
- As one of the "community partners" of the Milwaukee Police Department District 2, again participated in its annual Open House, promoting Mitchell Street's businesses.
- Coordinated and Informed business owners and merchants of the WWBIC loan program, the WHEDA Transform Milwaukee Loan Guarantee Program, and the business training classes offered by WWBIC, the Multicultural Entrepreneurial Institute and the Hispanic Chamber of Commerce-Wisconsin. This is in addition to assisting businesses with the City's various Grant programs.
- Cooperated with the new developer/owners of the former Goldman's building in its renovation plans for the new tenant, the Gerald Ignace Indian Health Center, which took occupancy early this year. The building had been vacant for over seven years, and its new appearance is a welcome addition to the commercial corridor and another major step in the continuing rejuvenation of the Street. There is 1500 sq.ft. on the street level of the building to be leased to a retail business, and BID #4 is assisting in efforts to lease that space.
- Monitored the lighting of the Mitchell Street commercial corridor and the City's public parking lots for problems, lights out, etc.
- After an opening delay, a new full-service food market, Mitchell Street Market Place, began operations in the large retail space (formerly a Walgreens) on Historic Mitchell Street early this year. The space had been vacant for over four years. The property and business owner utilized a City RIF Grant.
- Continued efforts with the new owners of the old Juneau Theatre building who, after major renovations, completing converting the building into an apartment complex with retail on the street level, along with a large, gated and well-lit parking lot. The apartments remain almost fully leased, and earlier this year, a new retail business leased the last previously vacant storefront.
- Continually maintain the BID #4 Website and Facebook, which had been rebuilt last year, and added new informational features, photos, etc., to further stimulate economic development.
- Cooperated with the City's DPW Infrastructure Administration with the dissemination of information to property owners and businesses regarding the South 13th Street construction project, from West Forest Home Avenue to West Windlake Avenue.
- Again participated and supported the 2016 South Side's National Night Out event.

#### **2017 Goals and Objectives:**

- Continue to work closely with the Milwaukee Public Library in its 2017 relocation of the Forest Home Library to the Hills Building, another major economic development project for the commercial corridor. The project completion

of the Library relocation and the estimated 60 market-rate upper-floor apartments is scheduled for summer of 2017.

- Supporting and working with the Modjeska Theatre owners (MSDOC) to continue renovations for the re-opening of the Theatre, also a critical project and a very important part of the continuing efforts to rejuvenate Historic Mitchell Street.
- Scheduling the 7th Annual Mitchell Street Sun Fair, the last weekend of May, to continue to exhibit the spirit of community to the neighborhood, and promote destination shopping for the retailers and businesses on Mitchell Street. It also provides an additional fund raising activity for BID #4.
- Continuing to be one of the sponsors of, and participate in, the South Side's National Night Out event in August. The BID's Safety Committee will continue its efforts to maintain the commercial corridor as safe as possible with the supporting efforts of MPD.
- Continuing to work with property owners and businesses to renovate retail store fronts, using the City's Sign and Façade, RIF and White Box grant programs, via regularly scheduled informational workshops and meetings, and including the BID's annual Open House every September.
- Planning to re-initiate and coordinate "Mitchell Street Days" as a scheduled monthly summer event, to promote more shoppers and business to the commercial corridor. Advertising and media attention will be part of the event's plans. Coordinate the retail events with the involvement of the NEWaukee initiative.
- Continuing economic development activities to attract more, and a wider variety of, businesses to the Street, and to insure the sustainability and retention of current businesses on the Street.
- Explore the possibility of a Mitchell Street location for Milwaukee's new bike share program, Bublr Bikes.
- Continuing to inform property owners and businesses of current BID #4 activities and developments via Newsletters, special mailings, flyers and letters, and with regular updating of the BID's rejuvenated Web Site, which also includes Facebook and Twitter. The Web Site also provides information for potential new businesses and retailers to the commercial corridor.
- Implement some portions of the revitalization design project for the Street, using the UW-M/CED design concepts developed in 2014. This would include investigating some esthetic additions to the commercial corridor, i.e., hanging baskets, public art installations, etc.
- Developing new initiatives to continue gaining increased momentum in efforts to improve and enhance the challenges of the Historic Mitchell Street commercial corridor and retail district.
- Continuing and increasing more holiday street lighting, decorations and festivities, to broaden shopping activities and business during the holiday season.
- Attracting and securing a family restaurant/diner to Mitchell Street, to meet the breakfast, lunch and dinner needs of shoppers, residents and neighborhood businesses.
- Determining what new and additional events will create more economic development and destination shopping activities to the commercial corridor.
- Conducting a "Brokers' Fair" or regular contact program with commercial brokers to assist property owners in leasing their vacant commercial spaces, including creating a special flyer with information from the property owners.
- Creating a new, or updating the current, BID #4 promotional/marketing pamphlet.
- Continuing to maintain the four medians on Historic Mitchell Street with additional plantings, mulching, etc., and adding to the treescaping materials around all of the trees.
- Growing the successful 2014-15-16 Historic Mitchell Street public art program, with events to promote the commercial corridor.
- Cooperating with MPD in a possible upgrading of the 13 surveillance cameras on Historic Mitchell Street, from 6th to 13th.
- Seeing ways with the City's DPW to improve the commercial corridor's infra-structure.

July 2016

APPENDIX E  
BID State Statute

66.1109 Business improvement districts.

(1) In this section:

- (a) "Board" means a business improvement district board appointed under sub. (3) (a).
- (b) "Business improvement district" means an area within a municipality consisting of contiguous parcels and may include railroad rights-of-way, rivers, or highways continuously bounded by the parcels on at least one side, and shall include parcels that are contiguous to the district but that were not included in the original or amended boundaries of the district because the parcels were tax-exempt when the boundaries were determined and such parcels became taxable after the original or amended boundaries of the district were determined.
- (c) "Chief executive officer" means a mayor, city manager, village president or town chairperson.
- (d) "Local legislative body" means a common council, village board of trustees or town board of supervisors.
- (e) "Municipality" means a city, village or town.
- (f) "Operating plan" means a plan adopted or amended under this section for the development, redevelopment, maintenance, operation and promotion of a business improvement district, including all of the following:

1. The special assessment method applicable to the business improvement district.
  - 1m. Whether real property used exclusively for manufacturing purposes will be specially assessed.
  2. The kind, number and location of all proposed expenditures within the business improvement district.
  3. A description of the methods of financing all estimated expenditures and the time when related costs will be incurred.
  4. A description of how the creation of the business improvement district promotes the orderly development of the municipality, including its relationship to any municipal master plan.
  5. A legal opinion that subds. 1. to 4. have been complied with.
- (g) "Planning commission" means a plan commission under s. 62.23, or if none a board of public land commissioners, or if none a planning committee of the local legislative body.

(2) A municipality may create a business improvement district and adopt its operating plan if all of the following are met:

- (a) An owner of real property used for commercial purposes and located in the proposed business improvement district designated under par. (b) has petitioned the municipality for creation of a business improvement district.
- (b) The planning commission has designated a proposed business improvement district and adopted its proposed initial operating plan.
- (c) At least 30 days before creation of the business improvement district and adoption of its initial operating plan by the municipality, the planning commission has held a public hearing on its proposed business improvement district and initial operating plan. Notice of the hearing shall be published as a class 2 notice under ch. 985. Before publication, a copy of the notice together with a copy of the proposed initial operating plan and a copy of a detail map showing the boundaries of the proposed business improvement district shall be sent by certified mail to all owners of real property within the proposed business improvement district. The notice shall state the boundaries of the proposed business improvement district and shall indicate that copies of the proposed initial operating plan are available from the planning commission on request.
- (d) Within 30 days after the hearing under par. (c), the owners of property to be assessed under the proposed initial operating plan having a valuation equal to more than 40 percent of the valuation of all property to be assessed under the proposed initial operating plan, using the method of valuation specified in the proposed initial operating plan, or the owners of property to be assessed under the proposed initial operating plan having an assessed valuation equal to more than 40 percent of the assessed valuation of all property to be assessed under the proposed initial operating plan, have not filed a petition with the planning commission protesting the proposed business improvement district or its proposed initial operating plan.
- (e) The local legislative body has voted to adopt the proposed initial operating plan for the municipality.

(3)

- (a) The chief executive officer shall appoint members to a business improvement district board to implement the operating plan. Board members shall be confirmed by the local legislative body and shall serve staggered terms designated by the local legislative body. The board shall have at least 5 members. A majority of board members shall own or occupy real property in the business improvement district.
- (b) The board shall annually consider and may make changes to the operating plan, which may include termination of the plan, for its business improvement district. The board shall then submit the operating plan to the local legislative body for its approval. If the local legislative body disapproves the operating plan, the board shall consider and may make changes to the operating plan and may continue to resubmit the operating plan until local legislative body

approval is obtained. Any change to the special assessment method applicable to the business improvement district shall be approved by the local legislative body.

(c) The board shall prepare and make available to the public annual reports describing the current status of the business improvement district, including expenditures and revenues. The report shall include an independent certified audit of the implementation of the operating plan obtained by the municipality. The municipality shall obtain an additional independent certified audit upon termination of the business improvement district.

(d) Either the board or the municipality, as specified in the operating plan as adopted, or amended and approved under this section, has all powers necessary or convenient to implement the operating plan, including the power to contract.

(4) All special assessments received from a business improvement district and all other appropriations by the municipality or other moneys received for the benefit of the business improvement district shall be placed in a segregated account in the municipal treasury. No disbursements from the account may be made except to reimburse the municipality for appropriations other than special assessments, to pay the costs of audits required under sub. (3) (c) or on order of the board for the purpose of implementing the operating plan. On termination of the business improvement district by the municipality, all moneys collected by special assessment remaining in the account shall be disbursed to the owners of specially assessed property in the business improvement district, in the same proportion as the last collected special assessment.

(4m) A municipality shall terminate a business improvement district if the owners of property assessed under the operating plan having a valuation equal to more than 50 percent of the valuation of all property assessed under the operating plan, using the method of valuation specified in the operating plan, or the owners of property assessed under the operating plan having an assessed valuation equal to more than 50 percent of the assessed valuation of all property assessed under the operating plan, file a petition with the planning commission requesting termination of the business improvement district, subject to all of the following conditions:

(a) A petition may not be filed under this subsection earlier than one year after the date the municipality first adopts the operating plan for the business improvement district.

(b) On and after the date a petition is filed under this subsection, neither the board nor the municipality may enter into any new obligations by contract or otherwise to implement the operating plan until the expiration of 30 days after the date of hearing under par. (c) and unless the business improvement district is not terminated under par. (e).

(c) Within 30 days after the filing of a petition under this subsection, the planning commission shall hold a public hearing on the proposed termination. Notice of the hearing shall be published as a class 2 notice under ch. 985. Before publication, a copy of the notice together with a copy of the operating plan and a copy of a detail map showing the boundaries of the business improvement district shall be sent by certified mail to all owners of real property within the business improvement district. The notice shall state the boundaries of the business improvement district and shall indicate that copies of the operating plan are available from the planning commission on request.

(d) Within 30 days after the date of hearing under par. (c), every owner of property assessed under the operating plan may send written notice to the planning commission indicating, if the owner signed a petition under this subsection, that the owner retracts the owner's request to terminate the business improvement district, or, if the owner did not sign the petition, that the owner requests termination of the business improvement district.

(e) If after the expiration of 30 days after the date of hearing under par. (c), by petition under this subsection or subsequent notification under par. (d), and after subtracting any retractions under par. (d), the owners of property assessed under the operating plan having a valuation equal to more than 50 percent of the valuation of all property assessed under the operating plan, using the method of valuation specified in the operating plan, or the owners of property assessed under the operating plan having an assessed valuation equal to more than 50 percent of the assessed valuation of all property assessed under the operating plan, have requested the termination of the business improvement district, the municipality shall terminate the business improvement district on the date that the obligation with the latest completion date entered into to implement the operating plan expires.

(5)

(a) Real property used exclusively for residential purposes and real property that is exempted from general property taxes under s. 70.11 may not be specially assessed for purposes of this section.

(b) A municipality may terminate a business improvement district at any time.

(c) This section does not limit the power of a municipality under other law to regulate the use of or specially assess real property.



### BID #4 (Greater Mitchell Street) Board Member Sheet

**Board Organization:** 15 members, at least eight members (majority) are owners or occupants of property and/or businesses within the District. Any non-owner or non-occupant appointed to the Board shall be a resident of the City of Milwaukee.

<u>Board Member</u>	<u>Title</u>	<u>Start Date</u>	<u>End Date</u>
Jesus Nanez	President	5/1/2015	5/1/2018
Dimity Grabowski	Vice President	2/25/2013	2/25/2017
Milton Pivar	Treasurer	6/6/2014	6/6/2017
Demitra Copoulos	Secretary	9/09/2013	9/9/2016*
Amrit Patel	Member	7/27/2015	7/27/2018
Gloria Marquez	Member	7/05/2016	7/05/2019
Juan Ordaz	Member	7/28/2014	7/28/2017
John Dye	Member	3/12/2015	3/12/2018
J. Alejandro (Alex) Fuentes	Member	6/20/2013	6/20/2016*
Joseph Arnezeder	Member	2/13/2014	2/13/2017
David Rotter	Member	11/7/2014	11/7/2017
Augustin Garnica	Member	3/18/2015	3/18/2018
Raul Gutierrez	Member	10/21/2015	10/21/2018

As of 8/31/2016, 2 vacancies exist on the Board

\*Currently in the reappointment process

