

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

**OPERATING PLAN FOR YEAR 30:
2022**

SUBMITTED BY:

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

PREPARED BY: Michael D'Amato, BID Director

**OPERATING PLAN
BID #13**

2022: Year 30

TABLE OF CONTENTS

- I. INTRODUCTION**
- II. DISTRICT BOUNDARIES**
- III. PROPOSED OPERATING PLAN**
 - A. Plan Objectives**
 - B. Proposed Activities - Year 30**
 - C. Proposed Expenditures - Year 30**
 - D. Financing Method**
 - E. Organization of BID Board**
- IV. METHOD OF ASSESSMENT**
 - A. Assessment Rate and Method**
 - B. Excluded and Exempt Property**
- V. RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN
AND ORDERLY DEVELOPMENT OF THE CITY**
 - A. City Plans**
 - B. City Role in District Operations**
- VI. FUTURE YEAR OPERATING PLANS**
 - A. Phased Development**
 - B. Amendment, Severability and Expansion**
- VII. APPENDICES**
 - A. List of 2020-2021 Board Members**
 - B. Year 30 Assessments and Properties within the BID**

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 2019 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 the all earlier plans as adopted by the Common Council. This plan emphasizes the elements that are required by Sec. 661109 Wis. Stats and the changes for 2020. 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 2021 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.

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 2022 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, that will help create an identity for the district, keep customers on the street 18 hours/day and bolster pedestrian safety.
5. Maintain Holiday decorations to be mounted on existing harp lights. As well, explore the design and purchase of banners to erect on harp lights.
6. 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.
7. Assist with the creation and funding of at least one new storefront and parklet to create a more noticeable and attractive outdoor dining experience.

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 20- 2021

- 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.
- Working with Milwaukee County Transit, City of Milwaukee DPW, a local artist and local business owners to beautify the northwest corner of Oak and Loc with art and other improvements implemented on the city owned electrical box and county owned bus shelter. Through the assistance of the local Alderman and DPW much infrastructure "clean-up" work has occurred at the intersection. As well, the adjacent property owner has invested funds in repaving and beautifying their property with the addition of two new tenants in their building.
- The BID Board continued to monitor the most recent assessment cases and decisions that are negatively affecting local small business owners on the street. Due to some recent court decisions and the reaction of the Assessor to threatened legal action small business owners on the street feel as if they are now carrying a larger portion of the burden The Board continues to investigate whether additional action may be taken. This effort is ongoing.
- Assisting with search for commercial tenant for mixed-use development at the northeast corner of Oakland and Locust (2900 Apartments). The new development, which includes 55 new apartments along with 10,000 sq. ft of new retail space represents the first major new construction on Oakland Avenue over the past 10 years. The BID has been actively involved in supporting the new development. The BID is assisting in identifying retail tenants that will add to the mix of businesses on the street.

BID staff remained active with the City of Milwaukee BID Council and the working group assembled to review and advocate for legislation that benefits BID's, local business and local property owners at the State and local level.

- Continued efforts to add to the mix of board members. In a very small BID district it has been difficult to recruit and recommend a diverse group of people to serve on the BID Board. Staff will continue with that effort.

C. Proposed Activities — Year 30

The principal activities to be undertaken by the district during its 29th 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. In particular with the space that formerly housed Monster Pizza and Black Rose Pub, a key location within the district in a building that has traditionally been an anchor. 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. Staff will continue to work with the owner of the building at 2847-2851 N. Oakland to modernize their storefront, add the first parklet to the street and fill newly converted storefronts.
3. Continue with arts and beautification efforts for the intersection of Oak and Loc.
4. Coordination and monitoring of the Graffiti Removal and Street Maintenance Program for area merchants.
5. Continued communication of BID Board Activities to members of the BID.
6. Coordinate new ideas for business district identity.
7. 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.
8. Work with BIDs from East Side, Downer, Brady and Shorewood to explore possible events and work together to improve the east side.
7. Design, purchase and erect new banners for harp lights.

D. Proposed Expenditures – Year Thirty

Program Expenses

Facade improvement/parklet matching funds	\$ 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 30 Special Assessments (City Milw.):	\$ 25,000
Carry Over, 2021 funds:	\$ 80,000 (est.)

Total available revenues: \$ 105,000 (est)

E. Financing Method

It is estimated that the district will carry forward approximately \$80,000 from 2021. 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 (approx.) from property owners through the special assessment and use approximately \$80,000 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.

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 takes into account all characteristics of a property in relation to benefits derived. The formula is identical to the formula adopted by the board for 2021. For the first time 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.

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 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 annual audits as required per sec. 66.1109 of the BID law.
- Provide the Board, through the Tax Commissioner's Office on or before June 1st of each Plan year, with the official city records on the assessed value of each tax key number with the district, as of January 1st 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 30 activities, and information on specific assessed values, budget amounts and assessment amounts are based on Year 29 condition. 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

2020-21 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

Jesse Vanderlinden, Member –

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

Taxkey	Address	BID Assessble Value	BID Assessment
3150002000	2977-2979 N OAKLAND AV	\$ 137,319.00	\$ 242.84
3150003000	2975 N OAKLAND AV	\$ 113,529.00	\$ 221.30
3150005000	2961-2963 N OAKLAND AV	\$ 262,295.00	\$ 405.09
3150007000	2955 N OAKLAND AV	\$ 186,000.00	\$ 450.26
3150008000	2949-2951 N OAKLAND AV	\$ 118,196.00	\$ 255.13
3150009000	2945-2947 N OAKLAND AV	\$ 60,559.00	\$ 120.89
3150010000	2943 N OAKLAND AV	\$ 101,361.00	\$ 203.95
3150302000	2935 N OAKLAND AV	\$ 365,500.00	\$ 626.97
3150303000	2929 N OAKLAND AV	\$ 167,580.00	\$ 325.27
3150304000	2927 N OAKLAND AV	\$ 94,147.00	\$ 175.46
3150305000	2921-2923 N OAKLAND AV	\$ 262,485.00	\$ 486.63
3150307110	2907-2911 N OAKLAND AV	\$ 1,317,800.00	\$ 2,107.65
3151201000	1719-1725 E LOCUST ST	\$ 296,200.00	\$ 825.90
3151202000	2857-2867 N OAKLAND AV	\$ 435,300.00	\$ 914.60
3151203000	2853-2855 N OAKLAND AV	\$ 284,088.00	\$ 431.96
3151204000	2845-2851 N OAKLAND AV	\$ 396,219.00	\$ 662.51
3151301000	2831 N OAKLAND AV	\$ 184,700.00	\$ 1,250.45
3160753111	2830 N OAKLAND AV	\$ 919,200.00	\$ 2,543.44
3160754000	2840-2846 N OAKLAND AV	\$ 637,800.00	\$ 1,162.18
3160755000	2850-2862 N OAKLAND AV	\$ 604,230.00	\$ 1,162.94
3160756000	2864-2866 N OAKLAND AV	\$ 395,658.00	\$ 538.61
3161119100	2974 N OAKLAND AV	\$ 399,700.00	\$ 927.79
3150306100	2915-2917 N OAKLAND AV	\$ 255,800.00	\$ 652.55
3150004000	2967 N OAKLAND AV	\$ -	\$ 890.55
3160080000	1802-1804 E NEWBERRY BL	\$ -	\$ -
3161120000	2968 N OAKLAND AV	\$ -	\$ -
3161891000	2900 N OAKLAND AV	\$ 1,570,590.00	\$ 1,744.55
3161871000	2950 N OAKLAND AV	\$ 2,494,700.00	\$ 5,670.62

Business Improvement District #13

Year 29 – 2021

Annual Report

A. Highlights of Activity from Year 29- 2021

- **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.**
- **Working with Milwaukee County Transit, City of Milwaukee DPW, a local artist and local business owners to beautify the northwest corner of Oak and Loc with art and other improvements implemented on the city owned electrical box and county owned bus shelter. Through the assistance of the local Alderman and DPW much infrastructure “clean-up” work has occurred at the intersection. As well, the adjacent property owner has invested funds in repaving and beautifying their property with the addition of two new tenants in their building.**
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legal action small business owners on the street feel as if they are now carrying a larger portion of the burden The Board continues to investigate whether additional action may be taken. This effort is ongoing.

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BID staff remained active with the City of Milwaukee BID Council and the working group assembled to review and advocate for legislation that benefits BID's, local business and local property owners at the State and local level.

- Continued efforts to add to the mix of board members. In a very small BID district it has been difficult to recruit and recommend a diverse group of people to serve on the BID Board. Staff will continue with that effort.

- Began conversations with the adjacent Urban Ecology Center to explore ways in which the two groups can work together to create events on the street or within Riverside Park