

**Oakland Ave.  
Business Improvement District #13  
OPERATING PLAN FOR YEAR 27:  
2019**

**SUBMITTED BY:**

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

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

**OPERATING PLAN  
BID #13**

**2019: Year 27**

**TABLE OF CONTENTS**

- I. INTRODUCTION**
- II. DISTRICT BOUNDARIES**
- III. PROPOSED OPERATING PLAN**
  - A. Plan Objectives**
  - B. Proposed Activities - Year 27**
  - C. Proposed Expenditures - Year 27**
  - 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 2018-2019 Board Members**
  - B. Year 27 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. 66.1109 Wis. Stats and the changes for 2019. 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 2019 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 2019 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.

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. Invest in new Holiday decorations to be mounted on existing 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. Purchase replacement decorative trash receptacles for the street. The existing units are beginning to fail and will require replacement.

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 26- 2018**

- 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.
- The BID did invest in new planters and hired KEI to provide professional planting and watering service. The results have been well received by business owners and customers alike.
- 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.
- Construction on a new catalytic mixed-use development at the northeast corner of Oakland and Locust (2900 Apartments) replacing a run-down Cousin's Subs location. 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 was actively involved in supporting the new development as well as acting as a liaison between the developer/general contractor and local businesses.
- The BID also welcomed new businesses Blaze Pizza and Good Land Wing Company to the street.
- Goodwill and Board member Jesse Vanderlinden participated in the Make Music Day with businesses all around the city who were offering Milwaukee musicians a venue to share their music with area customers and residents.

- 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.

### **C. Proposed Activities — Year 27**

The principal activities to be undertaken by the district during its 27th year of operation to achieve stated objectives will include:

1. Continue work on business recruitment and retention initiatives. Fortunately, the district has had nearly 100% retail occupancy in recent years. 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. Staff will continue to work with the developer of 2900 Apartments to help coordinate their effort with area businesses and complete the necessary construction and opening.
2. Coordination and monitoring of the Graffiti Removal and Street Maintenance Program for area merchants.
3. Continued communication of BID Board Activities to members of the BID.
4. Coordinate new holiday display on city street lights.
5. Identify and execute projects that will enhance the physical environment in order to attract and retain customers in the district such as the introduction of "parklets" to the street to encourage outdoor dining in areas that do not have the public space to do so now.
6. Reinvest in the limited infra-structure owned by the BID; namely Holiday decorations and refurbished trash receptacles.
7. Design, purchase and erect new banners for harp lights.

## D. Proposed Expenditures - Year Twenty-Seven

### Program Expenses

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Repair and refurbish trash receptacles	\$ 5,000
Purchase, design, erect new banners for harp lights	\$ 15,000
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

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Total expenditures: \$ 47,700

### Operating Revenues:

Adopted Year 27 Special Assessments (City Milw.):	\$ 25,153
Carry Over, 2018 funds:	\$ 64,000 (est.)

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Total available revenues: \$ 89,153 (est)

## E. Financing Method

It is estimated that the district will carry forward approximately \$89,000 from 2018. 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 \$26,000 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 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 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 2018. 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. In order to keep the annual amount, the BID collected at \$25,000, all other properties received an across the board 31% increase from their baseline assessments.

### **B. 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 provide assistance 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 27 activities, and information on specific assessed values, budget amounts and assessment amounts are based on Year 26 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/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 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

**2018 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

**William Stace, Member –**

Owner of The Mirimar Theater, 2844 N. Oakland Avenue

**Michael Harris, Member –**

Principal of Riverside University High School, 1615 E. Locust Street

**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





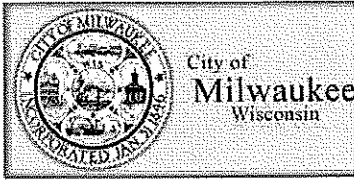
tax key no.	house_street	owner_name_1	Final 2018 BID assessment	2019 mixed use adjustment impact
3150002000	2977 OAKLAND	2977-79 N. Oakland Ave. LLC	\$ 191.57	-\$299.63
3150003000	2975 OAKLAND	JEREMIAH R FASS	\$ 175.39	-\$252.40
3150004000	2967 OAKLAND	SOON JA CHOI	\$ 1,120.52	\$266.55
3150005000	2961 OAKLAND	Gary J Biagiorno	\$ 300.62	-\$245.96
3150006000	2957 OAKLAND	MICHAEL BONGIORNO & JANET	\$ -	\$0.00
3150007000	2955 OAKLAND	Mary Lou Kelley Trust	\$ 475.20	\$113.04
3161871000	2950 OAKLAND	OAKLAND AVE ASSOC LLC	\$ 5,969.86	\$1,420.11
3150008000	2949 OAKLAND	2953 O LLC	\$ 199.99	-\$184.60
3150009000	2945 OAKLAND	2835 M LLC	\$ 97.82	-\$327.48
3150010000	2943 OAKLAND	H&A Property MGMT LLC	\$ 165.22	-\$258.42
3150301000	2937 OAKLAND	Matthew Kahl	\$ -	\$0.00
3150302000	2935 OAKLAND	Joel E. Garber 2012 TR D/6/20/	\$ 707.38	\$168.27
3150303000	2929 OAKLAND	Lagerman Dental LLC	\$ 263.65	-\$175.77
3150304000	2927 OAKLAND	Locust Bremen LLC	\$ 140.34	-\$312.37
3150305000	2921 OAKLAND	2921-2923 N. OAKLAND AVENUE, LLC	\$ 330.96	-\$249.67
3161872000	2914 OAKLAND	OAKLAND AVE ASSOC LLC	\$ 322.49	\$76.71
3150306100	2915 OAKLAND	2915 N. OAKLAND AV LLC	\$ 704.08	\$167.49
3150307110	2907 OAKLAND	SO-FEE PROPERTIES LTD	\$ 2,717.68	\$646.48
3151201000	1719 LOCUST	WASH BUILDING LLC	\$ 857.75	\$204.04
3151202000	2857 OAKLAND	ALLAN R RAMUSSEN	\$ 712.87	-\$475.24
3151203000	2853 OAKLAND	ALLAN & DANUTA, LLC	\$ 351.81	-\$265.40
3151204000	2845 OAKLAND	2845 OAKLAND LLC	\$ 524.47	-\$503.91
3151301000	2831 OAKLAND	Little Caesar's Enterprises	\$ 1,254.41	\$298.40
3160078000	1814 NEWBERRY	KEVIN B DUINN	\$ -	\$0.00
3160079000	1806 NEWBERRY	MURRAY HILLS INVESTMENT	\$ -	\$0.00
3160080000	1802 NEWBERRY	MICHAEL BRODERICK	\$ -	\$0.00
3160081000	2812 OAKLAND	GERALD P. BRODERICK	\$ -	\$0.00
3160753111	2830 OAKLAND	OAKLAND AVENUE II LLC	\$ 2,782.90	\$662.00
3160754000	2840 OAKLAND	Olympia IV LLC	\$ 1,158.61	\$275.61
3160755000	2850 OAKLAND	ROBERT C SCHMIDT JR	\$ 936.88	-\$766.54
3160756000	2864 OAKLAND	WCP INVESTMENTS LLC	\$ 429.44	-\$365.82
3160808100	2900 OAKLAND	CAPRI OAKLAND PROPERTIES LLC	\$ 1,280.66	\$304.64
3161119100	2974 OAKLAND	LINWOOD/OAKLAND LLC	\$ 980.93	\$233.34
3161120000	2968 OAKLAND	LILAC PROPERTIES LLC	\$ -	\$0.00
TOTAL:			\$ 25,153.49	\$0.00

annual cost: \$25,000.00

ADJUSTMENT FACTOR = 0: EXCLUSIVELY RESIDENTIAL PARCELS NOT ASSESSED

- = Exempt Property
- = Final Assessments
- = Mixed Use Property
- = 2018 Adjustment





Common Council Home    Legislation    Calendar    Common Council    Boards and Commissions    Boards and Commission Members



Details    Description    Reports

Body Name: BUSINESS IMPROVEMENT DISTRICT BOARD #13 (OAKLAND AVENUE)

Type: Board or Commission

Meeting location:

Calendar (0)    Boards and Commission Members (7)    Sponsored Legislation (0)

Person Name	Title	Start Date	End Date	E-mail	Web Site	Appointed By
<a href="#">Clark Kaufmann</a>	Member	4/11/2014	4/11/2017*			<a href="#">Mayor Tom Barrett</a>
<a href="#">Jesse Vanderlinden</a>	Member	2/17/2017	2/17/2020*			<a href="#">Mayor Tom Barrett</a>
<a href="#">Michael Harris</a>	Member	4/11/2014	4/11/2017*			<a href="#">Mayor Tom Barrett</a>
<a href="#">Michael Vitucci</a>	Member	4/11/2014	4/11/2017*			<a href="#">Mayor Tom Barrett</a>
<a href="#">Salvador LoCoco</a>	Member	4/11/2014	4/11/2017*			<a href="#">Mayor Tom Barrett</a>
<a href="#">Thomas Aldridge</a>	Member	2/21/2017	2/21/2020*			<a href="#">Mayor Tom Barrett</a>
<a href="#">William Stace</a>	Member	4/30/2014	4/30/2017*			<a href="#">Mayor Tom Barrett</a>





# BID NO. 13: OAKLAND AVENUE

## CITY OF MILWAUKEE

Prepared by the Dept. of City Development Planning Division, 7/6/2017  
 Source: City of Milwaukee Information Technology Management Division;  
 Dept. of City Development Commercial Corridors Team

N



**Current Land Use**

- Single Family
- Duplex
- Multi-Family
- Condominium
- Commercial
- Mixed Use
- Manufacturing & Warehousing
- Transport & Utilities
- Agriculture & Fishing
- Public & Quasi-Public Buildings
- Public & Quasi-Public Open Space
- Vacant Land
- Unclassified

**Map Legend**

- Business Improvement District
- City Limit
- Parcel Boundary
- Freeway
- Major Street
- Street
- Railroad



# **Business Improvement District #13**

**Year 26 – 2018**

## **Annual Report**

- 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.
- The BID invested in new planters and hired KEI to provide professional planting and watering service. The results have been well received by business owners and customers alike.
- 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.
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