
**WEST NORTH AVENUE
BUSINESS IMPROVEMENT DISTRICT NO. 16
2008 OPERATING PLAN**

September 11, 2007

TABLE OF CONTENTS

I.	INTRODUCTION	page 3
II.	RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN AND ORDERLY DEVELOPMENT OF THE CITY	page 3
III.	DISTRICT BOUNDARIES	page 4
IV.	PROPOSED OPERATING PLAN	page 4
	a. Plan Objectives	
	b. Proposed Activities	
	c. Proposed Expenditures	
	d. Financing Method	
V.	METHOD OF ASSESSMENT	page 7
	a. Assessment Rate and Method	
	b. Excluded and Exempt Property	
VI.	CITY ROLE IN DISTRICT OPERATION	page 9
VII.	BOARD OF DIRECTORS	page 11
VIII.	MILWAUKEE WEST NORTH AVENUE BUSINESS ASSOCIATION	page 10
IX.	FUTURE YEARS' OPERATING PLANS	page 11
X.	AMENDMENT, SEVERABILITY, AND EXPANSION	page 11

**WEST NORTH AVENUE BUSINESS IMPROVEMENT DISTRICT
2008 OPERATING PLAN**

I. INTRODUCTION

In 1984, the Wisconsin legislature created Sec. 66.608 of the Statutes enabling cities to establish Business Improvement District (BIDs) upon the petition of at least one property owner within the proposed district. The purpose of the law is “. . . to allow businesses within those districts to develop, manage and promote the districts and to establish an assessment method to fund these activities.” Upon petition from property owners within the West North Avenue business district, the Common Council of the City of Milwaukee on September 27, 1995, by Resolution File Number 95078 created BID No. 16 (West Northern Avenue) and adopted its initial operating plan.

Section 66.608 (3) (b), Wis. Stats., requires that a BID Board “shall annually consider and make changes to the operating plan . . . The board shall then submit the operating plan to the local legislative body for approval.” The Board of BID No. 16 (Uptown Crossing Business District) submits this 2008 BID Operating Plan in fulfillment of the statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial July 1995 BID Operating Plan. Therefore, it incorporates by reference the earlier plan as adopted by the Common Council. In the interest of brevity, this plan emphasizes the elements which are required by Sec. 66.608, Wis. Stats., and the proposed changes for 2008. This plan does not repeat the background information, which is contained in the initial operating plan.

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

No changes in the District planning or zoning have occurred since adoption of the initial operating plan.

III. DISTRICT BOUNDARIES

Boundaries of the district are West North Avenue from Sherman Boulevard westbound to North 60th Street and West Lisbon Avenue North 45th Street Westbound to North 52nd Street. A listing of properties in the district is provided in Appendix A.

IV. PROPOSED OPERATING PLAN

a. Plan Objectives

The BID will be used to finance the business property owners' share of the cost of streetscape improvements. The objectives of this streetscaping project are as follows:

1. Improve the overall appearance and image of the street.
2. Enhance safety and security by increasing the amount of street and pedestrian level lighting.
3. Attract new businesses and increase private investment in the district.
4. Create an environment which will attract new customers and increase economic viability in the area.

The streetscaping may include, but is not limited to, improvements such as; installation of pedestrian level "harp" lighting; replacing portions of the curb, gutter, and sidewalk; replacing portions of the sidewalk with paving

brick; planting of street trees; and installation of bollards, benches, waste containers, landscaping, and other streetscape amenities

b. Proposed Activities

Principal activities to be undertaken by the BID during 2008 will include, but are not limited to:

1. Monitoring the continued installation and implementation of the streetscape improvements. Two Hundred Fifty Thousand Dollars (\$250,000) of additional major improvements, which was approved in 2002, are mostly completed and 'finishing touches' should be completed as they are determined and/or found. The most significant expense to date is the installation of "acom" lamps on the overhead street lights and adding electric outlets to these poles for holiday lighting. The additional expense is part of a contract BID No. 16 has with the City of Milwaukee.
2. Maintaining communication with the property owners and business operators in the district regarding the design and implementation of the project via quarterly newsletters to the district
3. Monitoring the ongoing maintenance of streetscape improvements.
4. Negotiating and entering into a landscape maintenance agreement to provide installation and ongoing maintenance of plants and street banners including four (4) seasonal changes.

5. Via involvement with other community resources, investigate avenues to facilitate economic development, real estate acquisition and redevelopment opportunities, and activities including management of BID functions.
6. Via new lighting on existing artwork and submitting a "Request For Proposal" to local/regional artists for new artwork in the west triangle intersection of the BID, public artwork will become a focus of BID decorations and public enjoyment.

c. Proposed Expenditures

PROJECT BUDGET 2008

Project Expenses

Debt Expense* (paid to City of Milwaukee)	\$43,194
---	----------

Operating Expenses

Insurance	\$1,275
Ongoing Street Maintenance (may include, but is not limited to, replacement of damaged street amenities and street landscaping, graffiti removal, and landscaping maintenance.)	35,500
Seasonal Decorations	3,975
General Expenses	2,923.24
Professional Services	10,850
<u>Total Expenses</u>	<u>\$102,726</u>

* The streetscaping project was initiated in September 1996. In 2008, we will continue to finalize this major project which was nearly finalized in 2007, which includes the change out the cobra street lighting to match the pedestrian level lighting, adding holiday lighting and other street amenities i.e.e. furniture, bus shelter etc. Project costs have been approved for approximately \$500,000. It is unclear if this assessment will be part of the 2007 budget. This is a matching grant project with 50% paid by the BID and 50% paid by the city.

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

The BID Board will have the authority and responsibility to prioritize expenditures and to revise the district budget as necessary to match the funds actually available. Any funds unspent at the end of 2007 shall be carried over to 2008 and applied against future expenses. It is estimated that the BID will carry forward approximately \$13,474 of currently held funds for future expenses.

d. Financing Method

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

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

The Public Improvement Development and Maintenance Agreement constitutes a long-term commitment and the district will not be terminated until all repayments to the City have been made and adequate provision is made for the operation and management of the improvements financed through the district. The Public Improvement Development and Maintenance Agreement are in addition to this operating plan. The new contract for 2008 will be similar in nature to the current contract.

V. METHOD OF ASSESSMENT

a. Assessment Rate and Method

As of 2007 the properties in the district had a total assessable value of \$22,675,700. This plan proposes to assess the taxable property in the district at a new rate of \$5.50 per \$1,000 of assessed value for the purposes of the BID. Appendix A shows the projected BID assessment for each property included in the district.

The principle behind the assessment methodology is that each property owner should contribute to the BID in proportion to the benefit derived from the BID. After consideration of assessment methods, it was determined that the assessed value of the property was the characteristic most directly related to the potential benefit provided by the BID.

The variables used to determine the regular BID assessments are:

1. The total assessed value of each tax key parcel within the district;
and
2. The specific dollar amount per \$1,000 of the assessed value of each tax key parcel.

The assessment methodology is as follows: For each of the taxable tax key parcels within the BID boundaries, the BID assessment is calculated by applying a \$5.50 per \$1,000 charge against the assessed value of the parcel.

b. Excluded and Exempt Property

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

1. Sec. 66.608 (1) (f) lm: The district may contain property used exclusively for manufacturing purposes, as well as properties used in part for manufacturing. These properties will be assessed according to the method set forth in this plan because it is assumed that they will benefit from development in the district.
2. Sec. 66.608 (5) (a): Property known to be used exclusively for residential purposes will not be assessed. Such properties are identified as BID Exempt Properties in Appendix A, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding Sec. 66.608 (1) (b), Wis. States., property exempt from general real estate taxes have been excluded from the district. Privately owned tax exempt property, which is expected to benefit from district activities, may be asked to make a financial contribution on a voluntary basis.

VI. CITY ROLE IN DISTRICT OPERATION

The City of Milwaukee has committed to helping private property owners in the district promote its development. To this end, the City has played a significant role in the creation of the BID and in the implementation of its operating plan. In particular, the City will continue to:

1. Provide technical assistance to the proponents of the district through adoption of the operating plan and provide assistance as appropriate thereafter.

2. Monitor and, when appropriate, apply for outside funds, which could be used in support of the district.
3. Collect BID assessments, maintain the BID assessments in a segregated account, and disburse the BID assessments to the district.
4. Receive annual audits as required per Sec. 66.608 (3) (c) of the BID law.
5. On or before June 1st of each plan year, provide the Board, through the Tax Commissioner's Office, with the official City records on the assessed value of each tax key number within the district as of January 1st of each plan year for the purposes of calculating the BID assessments.
6. Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.

VII. BUSINESS IMPROVEMENT DISTRICT NO. 16 BOARD OF DIRECTORS

The Board's primary responsibility will be implementation of this operating plan. The current BID No. 16 Board of Directors is comprised as follows:

- Gordon Steimle
Neighborhood resident, Washington Heights location
- Jill Trachte
Property owner, business owner, North Avenue location
- Christine McRoberts

2008 Proposed

Changes

Changes

Total Assessment

Improvement Assessment

Land Assessment

Property Class

Owner Mailing Address

Owner

Property Address

Record Status

Check Digit

Taxkey

BID #

Table with columns: BID #, Taxkey, Check Digit, Record Status, Property Address, Owner, Owner Mailing Address, Property Class, Land Assessment, Improvement Assessment, Total Assessment, Changes, and 2008 Proposed Changes. It lists various commercial and residential property entries with their respective values and assessment details.

16	3461603000 2	Active	5115 W NORTH	ASKIA HANEY	5115 W NORTH AV	Residential	7500	\$187,500	\$195,000	\$5.50	\$1,072.50
16	3461604000 8	Active	5119 W NORTH	ELLEN N AHNERT	8017 S 68TH ST	Local Commercial	8400	\$81,900	\$81,900	\$5.50	\$896.50
16	3461605000 3	Active	5125 W NORTH	B C MANAGEMENT LLC	2232 N 52ND ST	Local Commercial	9600	\$154,600	\$163,000	\$5.50	\$1,333.75
16	3461606000 1	Active	5129 W NORTH	HEFENG CHU	2232 N 52ND ST	Local Commercial	12500	\$230,000	\$242,500	\$5.50	\$671.00
16	3461623000 8	Active	5211 W NORTH	FUTURE HEIGHTS LLC	1740 N 49TH ST	Local Commercial	9600	\$112,400	\$122,000	\$5.50	\$594.00
16	3461624000 7	Active	5205 W NORTH	FUTURE HEIGHTS LLC	1811 N 49TH ST	Local Commercial	9600	\$98,400	\$108,000	\$5.50	\$479.60
16	3461625000 2	Active	5201 W NORTH	FUTURE HEIGHTS LLC	1740 N 49TH ST	Local Commercial	8400	\$78,800	\$87,200	\$5.50	\$491.15
16	3469971000 6	Active	5311 W NORTH	ADRIAN ALVARADO LLC	5311 W NORTH AV	Local Commercial	10600	\$78,300	\$89,300	\$5.50	\$1,468.50
16	3470270000 9	Active	4501 W NORTH	ADRIAN ALVARADO LLC	6154 S EARLAND AV	Local Commercial	14400	\$252,600	\$267,000	\$5.50	\$466.40
16	3470280000 4	Active	4517 W NORTH	CLED BURNS BOST	2636 N SHERMAN BL	Local Commercial	7200	\$77,600	\$84,800	\$5.50	\$2,079.00
16	3470291000 6	Active	4517 W NORTH	CLED BURNS BOST	2636 N SHERMAN BL	Local Commercial	21600	\$98,600	\$378,000	\$5.50	\$105,500
16	3470210000 0	Active	2238 N 46TH	HOME ALLIANCE LLC	4535 W NORTH AV	Residential	5900	\$83,100	\$105,500	\$5.50	\$483.25
16	3470212000 5	Active	4538 W LISBON	RALPH E NEELY	P O BOX 100212	Residential	6600	\$83,100	\$89,700	\$5.50	\$483.25
16	3470213000 1	Active	4538 W LISBON	RALPH E NEELY	4538 W LISBON AV	Residential	7700	\$55,900	\$61,600	\$5.50	\$348.80
16	3470214000 7	Active	4530 W LISBON	CITY OF MILW	809 N BROADWAY	Exempt	0	\$0	\$0	\$5.50	\$0.00
16	3470215000 2	Active	4522 W LISBON	CITY OF MILW	809 N BROADWAY	Exempt	7200	\$62,700	\$89,900	\$5.50	\$494.45
16	3470216000 8	Active	4518 W LISBON	VICTORIA C OCHI	2755 N 59TH ST	Exempt	0	\$0	\$0	\$5.50	\$0.00
16	3470217000 3	Active	4500 W GARFIELD	CITY OF MILW	809 N BROADWAY	Exempt	0	\$0	\$0	\$5.50	\$0.00
16	3470218000 9	Active	4510 W LISBON	LISBON COMMUNITY	809 N BROADWAY	Exempt	0	\$0	\$0	\$5.50	\$0.00
16	3470219000 3	Active	4801 W NORTH	NII CAPITAL LLC	1903 STANLEY GAULT PKWY	Special Mercantile	53800	\$575,700	\$629,500	\$5.50	\$3,462.25
16	3470225100 3	Active	4733 W NORTH	METRO VISTA DEV GROUP LLC	4733 W NORTH AV	Local Commercial	5200	\$75,000	\$80,200	\$5.50	\$441.10
16	3470301000 X	Active	4728 W NORTH	METRO VISTA DEV GROUP LLC	P.O. BOX 080189	Local Commercial	3600	\$109,400	\$113,000	\$5.50	\$621.50
16	3470302000 5	Active	4719 W NORTH	METRO VISTA DEV GROUP LLC	P.O. BOX 080189	Local Commercial	8300	\$306,700	\$315,000	\$5.50	\$1,732.50
16	3470303000 0	Active	4701 W LISBON	METRO VISTA DEV GROUP LLC	P.O. BOX 080189	Local Commercial	17500	\$444,500	\$462,000	\$5.50	\$2,541.00
16	3470304000 6	Active	2238 N 48TH	METRO VISTA DEVELOPMENT	P.O. BOX 080189	Local Commercial	5700	\$9,700	\$15,400	\$5.50	\$64.70
16	347032121 9	Active	4623 W LISBON	FIRST MIL BANK	1305 MAIN ST	Special Mercantile	153700	\$173,300	\$327,000	\$5.50	\$1,798.50
16	3470335000 0	Active	4401 W LISBON	ABDIKADER H ASKAR	4527 W LISBON AV	Special Mercantile	29700	\$268,300	\$298,000	\$5.50	\$1,699.00
16	3470709000 2	Pending Drop	4415 W NORTH	4401 NORTH AVENUE LLC	2331 N 39TH ST	Local Commercial	14500	\$1,096,500	\$1,111,000	\$5.50	\$6,110.50
16	3470709000 8	Active	4415 W NORTH	K.B.T.C.S. INC	P O BOX 170181	Local Commercial	2400	\$117,600	\$120,000	\$5.50	\$660.00
16	3470710000 3	Active	4419 W NORTH	KEITH B TERRY	P O BOX 170181	Local Commercial	5000	\$113,000	\$118,000	\$5.50	\$648.00
16	3470711000 9	Active	4425 W NORTH	MICHAEL S WISNIEWSKI	1621 E IRVING PL	Local Commercial	4900	\$50,200	\$54,900	\$5.50	\$269.50
16	3470812000 1	Active	4321 W NORTH	COMMUNITY BAPTIST CHURCH	4321 W NORTH AV	Local Commercial	8800	\$66,100	\$68,500	\$5.50	\$363.55
16	3470913000 7	Active	2246 N 44TH	NORTH AVENUE INVESTMENTS LLC	4319 W NORTH AV	Local Commercial	5800	\$55,900	\$61,300	\$5.50	\$337.15
16	3470913000 7	Active	4318 W NORTH	NORTH AVENUE INVESTMENTS LLC	4319 W NORTH AV	Local Commercial	5400	\$55,900	\$61,300	\$5.50	\$337.15
16	3471001100 3	Active	4801 W NORTH	S PRICE REAL ESTATE HOLDINGS	4801 W NORTH AV	Local Commercial	33800	\$541,200	\$575,000	\$5.50	\$3,162.50
16	3471019000 5	Active	4816 W NORTH	JAMES E SMITH	4815 W NORTH AVE	Local Commercial	4600	\$89,500	\$93,100	\$5.50	\$512.05
16	3471020000 6	Active	4823 W NORTH	S PRICE REAL ESTATE HOLDINGS	4815 W NORTH AVE	Local Commercial	9200	\$252,600	\$262,000	\$5.50	\$1,441.00
16	3471021000 8	Active	2257 N 48TH	THEODIE D FREEMAN SR	4801 W NORTH AV	Local Commercial	5500	\$66,400	\$101,900	\$5.50	\$560.45
16	3471021000 8	Active	2252 N 48TH	CHARLES A BAURES &	4815 W NORTH AV	Residential	7600	\$126,900	\$137,500	\$5.50	\$756.25
16	3471041000 5	Active	4918 W NORTH	CHRISTINE MCROBERTS	W315 ST181 GLACIER PASS	Local Commercial	7200	\$91,700	\$98,900	\$5.50	\$543.65
16	3471042000 0	Active	5009 W NORTH	RICHARD V & MARY JEAN	625 E RAVENWOOD HILL CR	Mercantile Apartment	10000	\$156,500	\$165,500	\$5.50	\$910.25
16	3471043000 6	Active	5019 W NORTH	NEIL E & BEVERLY J PETERSON	14320 INDIAN RIDGE DR	Local Commercial	8300	\$141,700	\$150,000	\$5.50	\$623.00
16	3471044000 1	Active	5027 W NORTH	HIMOUNT INVESTMENTS LLC	227 E FAIRMOUNT AV	Local Commercial	12100	\$112,900	\$125,000	\$5.50	\$687.50
16	3479992000 1	Active	5033 W NORTH	JOHN H KOSTECKI	2150 N 56TH ST	Local Commercial	13300	\$55,100	\$68,400	\$5.50	\$376.20

\$27,175.60

\$149,465.80