

BUSINESS IMPROVEMENT DISTRICT NO. 4

GREATER MITCHELL STREET

OPERATING PLAN FOR YEAR 2018 (YEAR 29)

9/21/2017

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I. INTRODUCTION

A. Background – History:

In 1984, the Wisconsin legislature created 66.1109 (formerly S. 66.608) of the Statutes (see Appendix D) 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 created Business Improvement District No. 4 (“BID 4”) and approved its initial operating plan with Common Council Resolution File No. 890176, adopted by reference July 28, 1989.

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.

Since 1989, BID #4 has submitted yearly-amended plans, adding and modifying its plan objectives as part of its ongoing management and promotion of the district, including in some instances its financing arrangements and assessment methodologies. This amended Operating Plan shall govern the operation of BID #4 during calendar year 2018. 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 2018 Operating Plan. (Appendix D)

III. PROPOSED 2018 OPERATING PLAN

A. Plan Objectives:

The 2018 mission and objectives of the BID #4 include: 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, graffiti-free, safe and friendly business neighborhood, and the promotion of a positive shopping destination for its merchants and businesses on the commercial corridor.

B. Proposed Goals and Activities :

Principle goals and activities to be engaged in by the District during its twenty-ninth year of operation 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; and increased property values. The BID also continues its efforts in revitalizing the historic beauty of the commercial corridor, thereby maintaining retail vibrancy in this culturally diverse district.

Refer to Appendix C for Additional 2018 Goals and Activities.

C. Proposed Expenditures and Income:

Proposed Expense Budget for 2018:

Business Development	\$3,550
Marketing and Promotion	3,454
Community Outreach	1,000
Safety and Security	612
Graffiti Removal	3,287
Meeting Expenses	500
Street Maintenance	7,500
Office Expenses	2,035
Rent	9,000
Telephone/Internet	2,436
Postage	525
Utilities	-0-
Repairs & Maintenance	634
Miscellaneous	145
Legal & Professional Services	9,300
Insurance	2,172
Personnel	70,950
Total Expense Budget for 2018:	\$117,100

Proposed Income Budget for 2018: \$127,610

D. Financing Method:

It is proposed to raise \$120,029 from 100 commercial properties, through BID assessments (see Appendix D), and it is projected that the 2018 Sun Fair will net \$5,000. Additionally, it is projected that BID #4 will have \$2,500 of miscellaneous income as well as \$81 of interest income. While the 2018 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. Print copies of the annual audit are 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 is the implementation of this Operating Plan. This requires 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 Operating 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:

Board Size – Fifteen (Per By-Laws)

Composition - At least the majority of the Board 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.

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.

Compensation – None

Meetings - All meetings of the Board shall be governed by the Wisconsin Open Meetings Law. The Board shall meet regularly, at least twice each year; however, the Board does, at the present time, meet bi-monthly. The Board has adopted rules of order ("By-Laws") to govern the conduct of its meetings. Standing committees meet as needed, with reporting to the Board at its regular Board meetings. A new Finance Committee was created in 2015, and meets quarterly.

Record Keeping - Files and records of the board's affairs shall be kept pursuant to public record requirements.

Staffing - The board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof. Current staff is one full-time employee - the executive director, plus an outside contracted accountant.

IV. METHOD OF ASSESSMENT

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 has been applied.

As of January 1, 2017, the commercial property in the district had a total assessed value of \$52,638,400. The Plan's creation assessed 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 2018 BID assessment for each property included in the District.

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.

State Statute 66.1109 (1)(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.

State Statute 66.1109(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.

In accordance with the interpretation of the City Attorney regarding State Statute 66.1109(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

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.

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 continues to play a significant role in its creation of the Business Improvement District and in the implementation of the Operating Plan.

In particular, the City:

Provides technical assistance to the proponents of the district through adoption of the Plan, and provides assistance as appropriate thereafter.

Monitors, and when appropriate, applies for outside funds that could be used in support of the district.

Collects assessments, maintained in a segregated account, and disburses the monies for the maintenance of the business district.

Mandates the conduction by an outside auditor of an annual audit of the BID, as required per sec. 66.1109(3)(c) of the BID law.

Provides 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 1st of each Plan year, for purposes of calculating the BID assessments.

Encourages and works with the State of Wisconsin, Milwaukee County and other units of government to support the activities of the District.

VI. PLAN APPROVAL PROCESS

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 has been followed:

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.

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.

The City Plan Commission will hold a public hearing, will approve or disapprove the Plan, and will report its action to the Common Council.

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.

The Common Council will act on the proposed BID Plan.

If adopted by the Common Council, the proposed BID Plan is sent to the Mayor for his approval.

If approved by the Mayor, the BID is created and the Mayor will appoint members to the district board established to implement the Plan.

Petition Against Creation of the District:

The City may not create the District, if, within 30 days of the City Plan Commission's hearing, a petition is filed with the City containing signatures of:

Owners of property to be assessed under the proposed initial Operating Plan having a valuation equal to more than 40% 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

Owners of property to be assessed under the proposed initial Operating Plan having an assessed valuation equal to more than 40% of the assessed valuation of all property to be assessed under the proposed Operating Plan.

Early Termination of the District:

The City shall consider terminating the District if the owners of property assessed under the Operating Plan having a valuation equal to more than 50% of the valuation of all property assessed under the Operating Plan, using the method of valuation specified herein, or the owners of property assessed under the Operating Plan having an assessed valuation equal to more than 50% of the assessed valuation of all property assessed under the Operating Plan, file a petition with the City Plan Commission requesting termination of the District. On or after the date such a petition is filed, neither the Board nor the City may enter into any new obligations by contract or otherwise until the expiration of thirty (30) days after the date a public hearing is held and unless the District is not terminated.

Within thirty (30) days after filing of a petition, the City Plan Commission shall hold a public hearing on the proposed termination. Notice of the hearing shall be published as a Class 2 notice. Before publication, a copy of the notice with a copy of the Operating Plan and a copy of the detail map showing the boundaries of the District shall be sent by certified mail to all owners of real property within the District.

Within thirty (30) days after the date of such hearing, every owner of property assessed under the Operating Plan may send a written notice to the City Plan Commission indicating, if the owner signed a petition, that the owner retracts the owner's request to terminate the District or, if the owner did not sign the petition, that the owner requests termination of the District.

If, after the expiration of thirty (30) days after the date of the public hearing, by petition or subsequent notification and after subtracting any retractions, the owners of property assessed under the Operating Plan having a valuation equal to more than 50% 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% of the assessed valuation of all properties assessed under the Operating Plan have requested the termination of the District, the City shall terminate the District on the date that the obligation with the latest completion date entered into, to implement the Operating Plan, expires.

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.

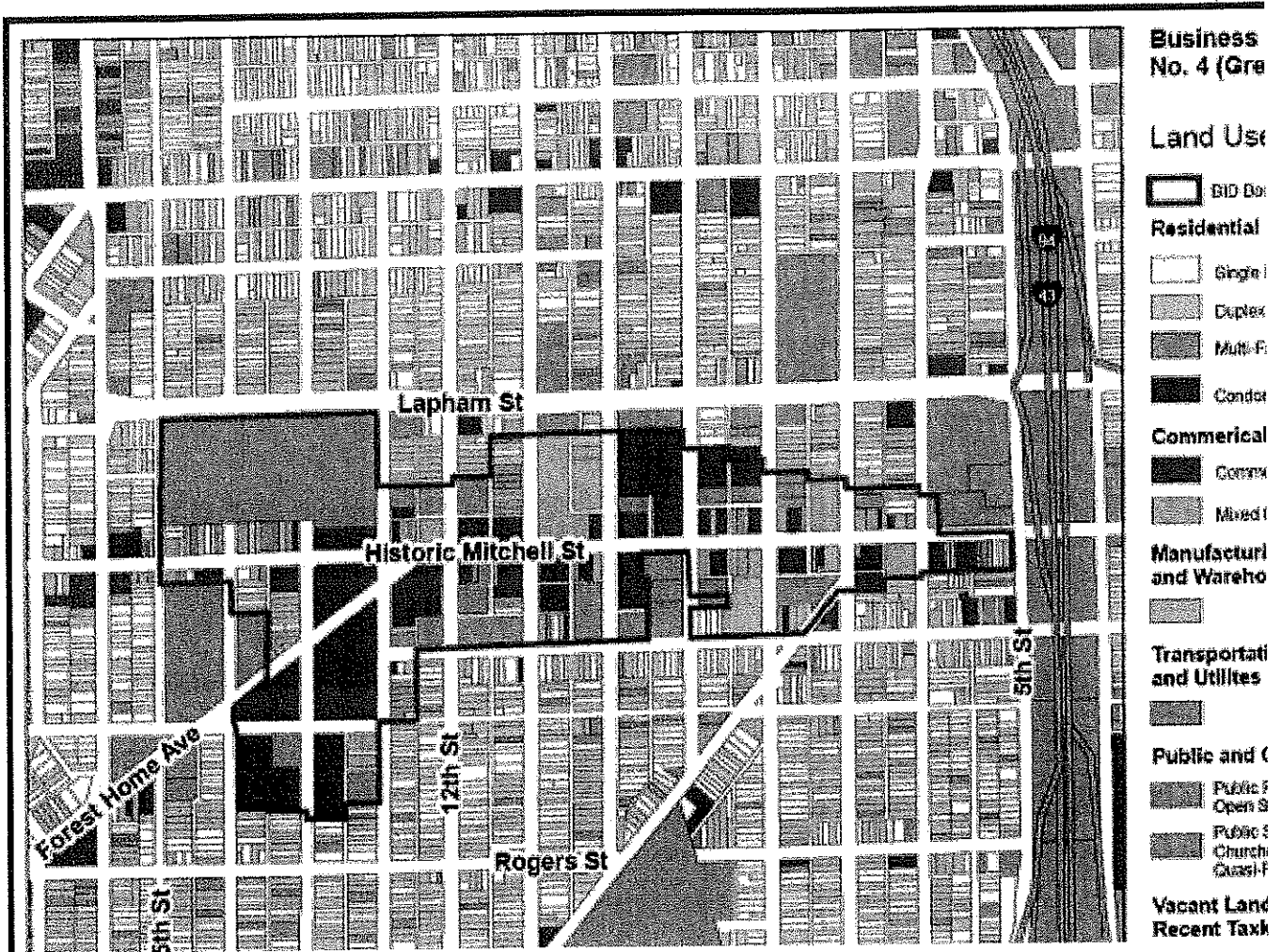
B. Amendment, Severability and Expansion

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 #4 Boundary Map



APPENDIX B

Listing of Current BID #4 Board of Directors:

Name	Title	Email	Property Owned (or works in)	Term
Rudy Gutierrez	President	raul.gutierrez@usbank.com	939 W. Historic Mitchell Street	10/21/15-10/21/18
Dimity Grabowski	Vice-President	dimity@wi.rr.com	1017 W. Historic Mitchell Street	7/10/17-7/10/20
Demitra Copoulos	Secretary	vitamindandc@gmail.com	1007 W. Historic Mitchell Street	3/13/17-3/13/20
Gloria Marquez	Treasurer	gloria.marquez@associatedbank.com	829 W. Historic Mitchell Street	7/5/16-7/5/19
Amrit Patel		apatel@yahoo.com	1023 W. Historic Mitchell Street	7/27/15-7/27/18
John Dye		jdye@me.com	1579 S. 9 th Street	3/12/15-3/12/18
Alexander Fuentes		alejandrofuen@gmail.com	Not in BID: 2836 W. Rawson	11/29/16-11/29/19
Joseph Arnezeder		joseph.david23@gmail.com	1306 W. Forest Home Avenue	3/30/17-3/30/20
David Rotter		davidarotter@gmail.com	Not in BID: 2119 W. Quincy Ct.	1/7/14-11/17/17
Augustin Garnica		tony.garnica55@gmail.com	1031 W. Historic Mitchell Street	3/18/15-3/18/18
Jesus E. Nanez		info@farmhousepaintsandsp.com	1134 W. Historic Mitchell Street	5/1/15-5/1/18
Victor Huyke		victordeconquistador@gmail.com	Not in BID: 2653 N. Holton Street	5/19/17-5/19/20

As of 8/31/2017, three vacancies exist on the Board.

APPENDIX C

Additional 2018 Proposed Goals and Activities:

- * Continuing coordination of efforts to complete an overall design plan, including capital improvements, safe traffic control, and parking lot utilization. Investigate a new branding for the commercial corridor to further identify and market it to potential businesses and developers via a series of Strategic Planning meetings.
- * Providing assistance to property owners and developers who are engaged in property improvements and redevelopment activities, utilizing the City's grant programs.
- * Promoting the unique historic significance and the commercial and cultural mix of the District.
- * Ensuring historical design-sensitive exterior renovations of buildings in the District, working closely with the City's Historic Preservation Commission, and utilizing the City's façade and grant programs where feasible.
- * Ensuring all commercial buildings within the District are maintained graffiti-free with the supporting City graffiti removal program via an annual contract with DNS.
- * Providing support and assistance to businesses that are engaging in activities that meet the BID's overall objectives. A potential third party loan program continues to be researched.
- * Continuing to implement, coordinate, support and expand positive activities and events which enhance retail and business recruitment and retention, and the property owners' interests.
- * Maintaining the neighborhood business district portfolio, including an inventory of commercial space availability for distribution to brokers and prospective retail tenants, and to respond to inquiries from developers. This inventory is also available and regularly updated on the BID's Website (mitchellstreet.com) and on BID #4's Facebook.
- * Continuing to work with the Milwaukee Police Department's District 2 for increased police protection and support, along with security measures and safety programs for a safe business and residential neighborhood. BID #4 has an active and involved Safety Committee comprised of Board members and volunteers, that works to reduce the vagrancy and panhandling issues. The commercial corridor also has 13 security surveillance cameras installed on Historic Mitchell Street, from 6th to 13th Streets. Vehicular speeding on the commercial corridor continues to be a major safety issue which we continue to address.
- * Coordinating the promotion and media coverage of District activities, as part of its marketing efforts.
- * Initiating, planning, coordinating, and promoting continual outreach events and activities for property and business owners and merchants (i.e., the successful annual 3-day Sun Fair on Historic Mitchell Street, resource fairs, business classes, holiday kick-off event and window decorating contest, the BID's annual open house for property and business owners, public art events, etc.), and initiating new positive events. These events and activities both promote the vibrant and unique retail area, and draw returning and new destination shoppers and visitors to the commercial corridor.
- * Assisting property and business owners with liaison to the City regarding permits, historic issues, grants, etc.
- * Supporting community organizations' outreach programs that link the business community to the community at large and to City of Milwaukee services and programs.
- * Distributing timely information to property owners, business owners, merchants and other interested parties via quarterly Newsletters, flyers, letters, resource seminars, business classes, and other appropriate methods.
- * Re-establishing a business Neighborhood Block Watch, with the assistance of MPD District 2, to continue to improve safety and security on the commercial corridor.
- * Presenting the BID's annual Open House for property and business owners and merchants, providing both networking opportunities, and also to obtain input from owners for the following year's operating plan.
- * Maintaining weekly clean-up of the commercial corridor, and maintenance of the medians and the street-scaping on Historic Mitchell Street. Continuing the projects of adding new litter containers (22 since 2015), and new flowering planters, a project that started with 8 new flowering plant containers in 2017.
- * Enforcing the historical guidelines for Historic Mitchell Street, working closely with the City's Historic Preservation Commission.

Please refer to BID #4's 2017-2018 Annual Report for a comprehensive listing of plans and accomplishments.

APPENDIX D

Projected Assessments for the 2018 Operating Plan:

Taxkey	Address	Property Class	Total Assessment	Bid #4 Assessment 2018
4600101110	1300 W HISTORIC MITCHELL	Local Commercial	\$ 1,088,000	\$ 2,500
4600113100	1301 W FOREST HOME	Local Commercial	\$ 40,800	\$ 163
4600115110	1337 W FOREST HOME	Local Commercial	\$ 1,658,000	\$ 2,500
4600118100	1905 S 13TH	Local Commercial	\$ 91,000	\$ 400
4600120000	1915 S 13TH	Residential	\$ 62,200	\$ -
4600121000	1919 S 13TH	Local Commercial	\$ 132,400	\$ 530
4600122000	1925 S 13TH	Residential	\$ 51,300	\$ -
4600123110	1937 S 13TH	Local Commercial	\$ 47,300	\$ 189
4600123120	1331 W BURNHAM	Local Commercial	\$ 918,000	\$ 2,500
4600123130	1940 S 14TH	Special Mercantile	\$ 1,191,000	\$ 2,500
4600301100	1841 S 14TH	Special Mercantile	\$ 560,000	\$ 2,240
4600303000	1416 W FOREST HOME	Local Commercial	\$ 79,600	\$ 400
4600304000	1412 W FOREST HOME	Local Commercial	\$ 80,900	\$ 400
4600305000	1406 W FOREST HOME	Local Commercial	\$ 1,700	\$ 7
4600306000	1400 W FOREST HOME	Local Commercial	\$ 80,600	\$ 400
4600307000	1741 S 14TH	Residential	\$ 41,400	\$ -
4600308100	1737 S 14TH	Residential	\$ 50,600	\$ -
4600308200	1737 S 14TH	Residential	\$ 18,900	\$ -
4600309000	1733 S 14TH	Residential	\$ 72,600	\$ -
4600310000	1729 S 14TH	Residential	\$ 37,100	\$ -
4600311000	1725 S 14TH	Residential	\$ 51,500	\$ -
4600312000	1721 S 14TH	Residential	\$ 65,500	\$ -
4600313000	1719 S 14TH	Residential	\$ 38,900	\$ -
4600315100	1401 W MITCHELL	Special Mercantile	\$ 827,000	\$ 2,500
4601032000	1500 W MITCHELL	Local Commercial	\$ 155,000	\$ 620
4601033000	1504 W MITCHELL	Residential	\$ 52,900	\$ -
4601034000	1510 W MITCHELL	Local Commercial	\$ 7,400	\$ 30
4601035000	1512 W MITCHELL	Residential	\$ 29,200	\$ -
4601036000	1516 W MITCHELL	Local Commercial	\$ 10,400	\$ 42
4601037000	1522 W MITCHELL	Mercantile Apartment	\$ 149,600	\$ -
4601038000	1524 W MITCHELL	Residential	\$ 57,800	\$ -
4601040100	1532 W MITCHELL	Local Commercial	\$ 129,700	\$ 519
4601041000	1670 S 15TH	Residential	\$ 40,100	\$ -
4601042000	1666 S 15TH	Residential	\$ 31,100	\$ -
4601060000	1400 W MITCHELL	Local Commercial	\$ 109,000	\$ 436
4601061000	1404 W MITCHELL	Local Commercial	\$ 89,100	\$ 400
4601062000	1408 W MITCHELL	Residential	\$ 54,400	\$ -
4601063100	1418 W MITCHELL	Mercantile Apartment	\$ 517,000	\$ -

4601065000	1424 W MITCHELL	Residential	\$ 66,100	\$ -
4601066000	1430 W MITCHELL	Exempt	\$ -	\$ -
4601068100	1436 W MITCHELL	Local Commercial	\$ 209,000	\$ 836
4601212110	1321 W LAPHAM	Exempt	\$ -	\$ -
4601861100	1302 W FOREST HOME	Special Mercantile	\$ 1,991,000	\$ 2,500
4610502100	621 W HISTORIC MITCHELL	Local Commercial	\$ 1,455,000	\$ 2,500
4610503000	635 W HISTORIC MITCHELL	Local Commercial	\$ 135,000	\$ 540
4610528000	715 W HISTORIC MITCHELL	Local Commercial	\$ 19,600	\$ 78
4610530000	709 W HISTORIC MITCHELL	Local Commercial	\$ 159,000	\$ 636
4610531000	705 W HISTORIC MITCHELL	Local Commercial	\$ 203,000	\$ 812
4610534100	716 W WINDLAKE	Exempt	\$ -	\$ -
4610537100	734 W WINDLAKE	Residential	\$ 52,700	\$ -
4610538000	728 W MAPLE	Residential	\$ 49,700	\$ -
4610539000	732 W MAPLE	Local Commercial	\$ 61,000	\$ 400
4610540000	738 W MAPLE	Local Commercial	\$ 117,000	\$ 468
4610541000	733 W HISTORIC MITCHELL	Local Commercial	\$ 321,000	\$ 1,284
4610542000	729 W HISTORIC MITCHELL	Local Commercial	\$ 110,000	\$ 440
4610544100	723 W HISTORIC MITCHELL	Local Commercial	\$ 243,000	\$ 972
4610545000	801 W HISTORIC MITCHELL	Local Commercial	\$ 266,000	\$ 1,064
4610546000	807 W HISTORIC MITCHELL	Local Commercial	\$ 359,000	\$ 1,436
4610547000	815 W HISTORIC MITCHELL	Local Commercial	\$ 118,000	\$ 472
4610548000	829 W HISTORIC MITCHELL	Special Mercantile	\$ 836,000	\$ 2,500
4610549000	833 W HISTORIC MITCHELL	Local Commercial	\$ 502,000	\$ 2,008
4610550110	1718 S 9TH	Special Mercantile	\$ 44,000	\$ 176
4610554000	836 W MAPLE	Residential	\$ 4,700	\$ -
4610555000	832 W MAPLE	Residential	\$ 2,700	\$ -
4610556000	828 W MAPLE	Residential	\$ 5,100	\$ -
4610557000	824 W MAPLE	Residential	\$ 4,700	\$ -
4610562110	800 W MAPLE	Manufacturing	\$ 804,700	\$ 2,500
4610570000	929 W HISTORIC MITCHELL	Local Commercial	\$ 477,000	\$ 1,908
4610572100	939 W HISTORIC MITCHELL	Special Mercantile	\$ 678,000	\$ 2,500
4610576110	930 W MAPLE	Exempt	\$ -	\$ -
4610583000	1003 W HISTORIC MITCHELL	Local Commercial	\$ 313,000	\$ 1,252
4610584000	1009 W HISTORIC MITCHELL	Local Commercial	\$ 153,000	\$ 612
4610585000	1013 W HISTORIC MITCHELL	Local Commercial	\$ 115,000	\$ 460

4610586000	1017 W HISTORIC MITCHELL	Local Commercial	\$ 149,000	\$ 596
4610587100	1023 W HISTORIC MITCHELL	Local Commercial	\$ 173,900	\$ 696
4610590000	1029 W HISTORIC MITCHELL	Local Commercial	\$ 130,000	\$ 520
4610592100	1039 W HISTORIC MITCHELL	Special Mercantile	\$ 774,000	\$ 2,500
4610595100	1726 S 11TH	Special Mercantile	\$ 321,000	\$ 1,284
4610598000	1038 W MAPLE	Local Commercial	\$ 90,200	\$ -
4610599000	1032 W MAPLE	Local Commercial	\$ 11,900	\$ 48
4610600000	1028 W MAPLE	Residential	\$ 45,900	\$ -
4610601000	1026 W MAPLE	Residential	\$ 24,900	\$ -
4610602000	1022 W MAPLE	Local Commercial	\$ 75,700	\$ 400
4610603100	1002 W MAPLE	Exempt	\$ -	\$ -
4610604000	1101 W HISTORIC MITCHELL	Local Commercial	\$ 829,000	\$ 2,500
4610605000	1117 W HISTORIC MITCHELL	Local Commercial	\$ 162,000	\$ 648
4610606000	1125 W HISTORIC MITCHELL	Local Commercial	\$ 32,700	\$ 131
4610607000	1129 W HISTORIC MITCHELL	Local Commercial	\$ 16,400	\$ 66
4610608000	1135 W HISTORIC MITCHELL	Local Commercial	\$ 317,000	\$ 1,268
4610609100	1718 S 12TH	Local Commercial	\$ 73,600	\$ 294
4610610110	1740 S 12TH	Mercantile Apartment	\$ 306,000	\$ -
4610616000	1733 S 11TH	Residential	\$ 25,000	\$ -
4610617000	1729 S 11TH	Exempt	\$ -	\$ -
4610618000	1725 S 11TH	Exempt	\$ -	\$ -
4610619100	1201 W HISTORIC MITCHELL	Local Commercial	\$ 241,000	\$ 964
4610620110	1213 W HISTORIC MITCHELL	Local Commercial	\$ 500,000	\$ 2,000
4610621110	1715 S 12TH	Local Commercial	\$ 201,000	\$ 804
4610622100	1730 S 13TH	Local Commercial	\$ 302,000	\$ 1,208
4610623000	1742 S 13TH	Residential	\$ 34,400	\$ -
4610624000	1744 S 13TH	Local Commercial	\$ 25,200	\$ 101
4610625000	1747 S 12TH	Exempt	\$ -	\$ -
4610635000	1220 W BURNHAM	Exempt	\$ -	\$ -
4610636000	1830 S 13TH	Local Commercial	\$ 123,000	\$ 492
4610637000	1828 S 13TH	Local Commercial	\$ 65,700	\$ 400
4610638000	1824 S 13TH	Local Commercial	\$ 71,000	\$ 400
4610639000	1820 S 13TH	Local Commercial	\$ 115,000	\$ 460
4610640000	1816 S 13TH	Local Commercial	\$ 82,500	\$ 400
4610641000	1812 S 13TH	Local Commercial	\$ 84,900	\$ 400
4610642000	1810 S 13TH	Residential	\$ 45,300	\$ -
4610643000	1800 S 13TH	Local Commercial	\$ 86,200	\$ 400
4610644000	1227 W MAPLE	Residential	\$ 40,000	\$ -
4610645000	1219 W MAPLE	Residential	\$ 4,900	\$ -

4611307110	1657 S 12TH	Exempt	\$ -	\$ -
4611311000	1202 W HISTORIC MITCHELL	Local Commercial	\$ 580,000	\$ 2,320
4611312000	1216 W HISTORIC MITCHELL	Local Commercial	\$ 133,000	\$ 532
4611313000	1222 W HISTORIC MITCHELL	Local Commercial	\$ 171,000	\$ 684
4611314000	1226 W HISTORIC MITCHELL	Local Commercial	\$ 245,000	\$ 980
4611315000	1662 S 13TH	Local Commercial	\$ 97,100	\$ 400
4611334000	1619 S 11TH	Residential	\$ 36,500	\$ -
4611335000	1623 S 11TH	Residential	\$ 36,300	\$ -
4611336000	1629 S 11TH	Residential	\$ 55,000	\$ -
4611337000	1633 S 11TH	Residential	\$ 69,000	\$ -
4611338000	1639 S 11TH	Residential	\$ 54,900	\$ -
4611339000	1643 S 11TH	Residential	\$ 54,000	\$ -
4611340000	1647 S 11TH	Residential	\$ 49,500	\$ -
4611341000	1651 S 11TH	Local Commercial	\$ 114,000	\$ 456
4611342000	1657 S 11TH	Residential	\$ 56,400	\$ -
4611343000	1659 S 11TH	Local Commercial	\$ 87,100	\$ 400
4611344000	1665 S 11TH	Local Commercial	\$ 142,000	\$ 568
4611345000	1100 W HISTORIC MITCHELL	Local Commercial	\$ 261,000	\$ 1,044
4611346000	1104 W HISTORIC MITCHELL	Exempt	\$ -	\$ -
4611347000	1108 W HISTORIC MITCHELL	Local Commercial	\$ 113,000	\$ 452
4611348100	1114 W HISTORIC MITCHELL	Local Commercial	\$ 218,000	\$ 872
4611350000	1122 W HISTORIC MITCHELL	Local Commercial	\$ 409,000	\$ 1,636
4611351110	1650 S 12TH	Exempt	\$ -	\$ -
4611374100	1623 S 10TH	Residential	\$ 71,200	\$ -
4611375000	1629 S 10TH	Local Commercial	\$ 143,000	\$ 572
4611377100	1000 W HISTORIC MITCHELL	Local Commercial	\$ 255,000	\$ 1,020
4611378110	1020 W HISTORIC MITCHELL	Mercantile Apartment	\$ 4,377,000	\$ 2,500
4611397100	930 W HISTORIC MITCHELL	Special Mercantile	\$ 2,455,000	\$ 2,500
4611419100	1644 S 9TH	Exempt	\$ -	\$ -
4611423110	1654 S 9TH	Exempt	\$ -	\$ -
4611426000	802 W HISTORIC MITCHELL	Exempt	\$ -	\$ -
4611427000	808 W HISTORIC MITCHELL	Local Commercial	\$ 195,000	\$ 780
4611428000	812 W HISTORIC MITCHELL	Local Commercial	\$ 109,000	\$ 436
4611429000	814 W HISTORIC MITCHELL	Local Commercial	\$ 90,100	\$ 400
4611430000	822 W HISTORIC MITCHELL	Local Commercial	\$ 208,000	\$ 832

4611431000	828 W HISTORIC MITCHELL	Local Commercial	\$ 129,000	\$ 516
4611432000	832 W HISTORIC MITCHELL	Local Commercial	\$ 339,000	\$ 1,356
4611469100	710 W HISTORIC MITCHELL	Mercantile Apartment	\$ 2,968,000	\$ 2,500
4611470000	720 W HISTORIC MITCHELL	Local Commercial	\$ 138,000	\$ 552
4611472100	728 W HISTORIC MITCHELL	Local Commercial	\$ 226,000	\$ 904
4611473000	734 W HISTORIC MITCHELL	Local Commercial	\$ 150,000	\$ 600
4611474000	1662 S 8TH	Exempt	\$ -	\$ -
4611475000	1656 S 8TH	Mercantile Apartment	\$ 442,000	\$ -
4611476000	1648 S 8TH	Mercantile Apartment	\$ 81,600	\$ -
4611508000	1659 S 6TH	Residential	\$ 63,700	\$ -
4611509000	1663 S 6TH	Local Commercial	\$ 98,100	\$ 400
4611510000	1669 S 6TH	Residential	\$ 47,800	\$ -
4611511000	1671 S 6TH	Residential	\$ 52,800	\$ -
4611512000	600 W HISTORIC MITCHELL	Local Commercial	\$ 112,000	\$ 448
4611514100	604 W HISTORIC MITCHELL	Local Commercial	\$ 176,000	\$ 704
4611515000	616 W HISTORIC MITCHELL	Local Commercial	\$ 87,900	\$ 400
4611516000	620 W HISTORIC MITCHELL	Local Commercial	\$ 51,600	\$ 400
4611517000	622 W HISTORIC MITCHELL	Local Commercial	\$ 259,000	\$ 1,036
4611518000	632 W HISTORIC MITCHELL	Local Commercial	\$ 397,000	\$ 1,588
4611519000	1662 S 7TH	Mercantile Apartment	\$ 19,500	\$ 78
4611520000	1658 S 7TH	Local Commercial	\$ 15,900	\$ 64
4611581000	601 W HISTORIC MITCHELL	Mercantile Apartment	\$ 2,974,000	\$ 2,500
4611601000	910 W HISTORIC MITCHELL	Local Commercial	\$ 375,300	\$ 1,501
4611602000	910 W HISTORIC MITCHELL	Mercantile Apartment	\$ 1,197,600	\$ -
4611603000	910 W HISTORIC MITCHELL	Mercantile Apartment	\$ 95,000	\$ -
4611611000	1640 S 10TH	Exempt	\$ -	\$ -
4611612000	1643 S 9TH	Mercantile Apartment	\$ 50,000	\$ -
4620625000	501 W HISTORIC MITCHELL	Local Commercial	\$ 267,000	\$ 1,068
4620626000	507 W HISTORIC MITCHELL	Local Commercial	\$ 12,700	\$ 51
4620627000	511 W HISTORIC MITCHELL	Exempt	\$ -	\$ -
4620628000	515 W HISTORIC MITCHELL	Local Commercial	\$ 114,000	\$ 456

4620629000	519 W HISTORIC MITCHELL	Special Mercantile	\$ 17,100	\$ 68
4620630000	521 W HISTORIC MITCHELL	Special Mercantile	\$ 17,100	\$ 68
4620631110	529 W HISTORIC MITCHELL	Special Mercantile	\$ 392,900	\$ 1,572
4620634000	539 W HISTORIC MITCHELL	Local Commercial	\$ 93,900	\$ 400
4620635000	541 W HISTORIC MITCHELL	Local Commercial	\$ 152,000	\$ 608
4620636100	545 W HISTORIC MITCHELL	Local Commercial	\$ 275,000	\$ 1,100
4620647000	546 W HISTORIC MITCHELL	Local Commercial	\$ 363,300	\$ 1,453
4690430120	1931 S 14TH	Special Mercantile	\$ 458,000	\$ 1,832
4690479110	1838 S 15TH	Local Commercial	\$ 859,000	\$ 2,500
4690480000	1439 W MITCHELL	Exempt	\$ -	\$ -
4690481000	1427 W MITCHELL	Residential	\$ 42,200	\$ -
4690482000	1423 W MITCHELL	Local Commercial	\$ 74,300	\$ 400
4690483000	1708 S 15TH	Residential	\$ 74,700	\$ -
4690484000	1714 S 15TH	Residential	\$ 45,300	\$ -
4690485000	1718 S 15TH	Residential	\$ 39,700	\$ -
4690486000	1722 S 15TH	Residential	\$ 52,900	\$ -
4690487000	1726 S 15TH	Residential	\$ 56,600	\$ -
4690499000	1511 W MITCHELL	Local Commercial	\$ 106,000	\$ 424
4690500000	1501 W MITCHELL	Local Commercial	\$ 84,400	\$ 400
4690502000	1533 W MITCHELL	Local Commercial	\$ 152,000	\$ 608
4690503000	1527 W MITCHELL	Local Commercial	\$ 120,000	\$ 480
4690504000	1523 W MITCHELL	Residential	\$ 62,100	\$ -
4693271000	1433 W BURNHAM	Special Mercantile	\$ 2,140,000	\$ 2,500
4693272000	1901 S 14TH	Local Commercial	\$ 960,000	\$ 2,500
Total				\$ 120,029

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.

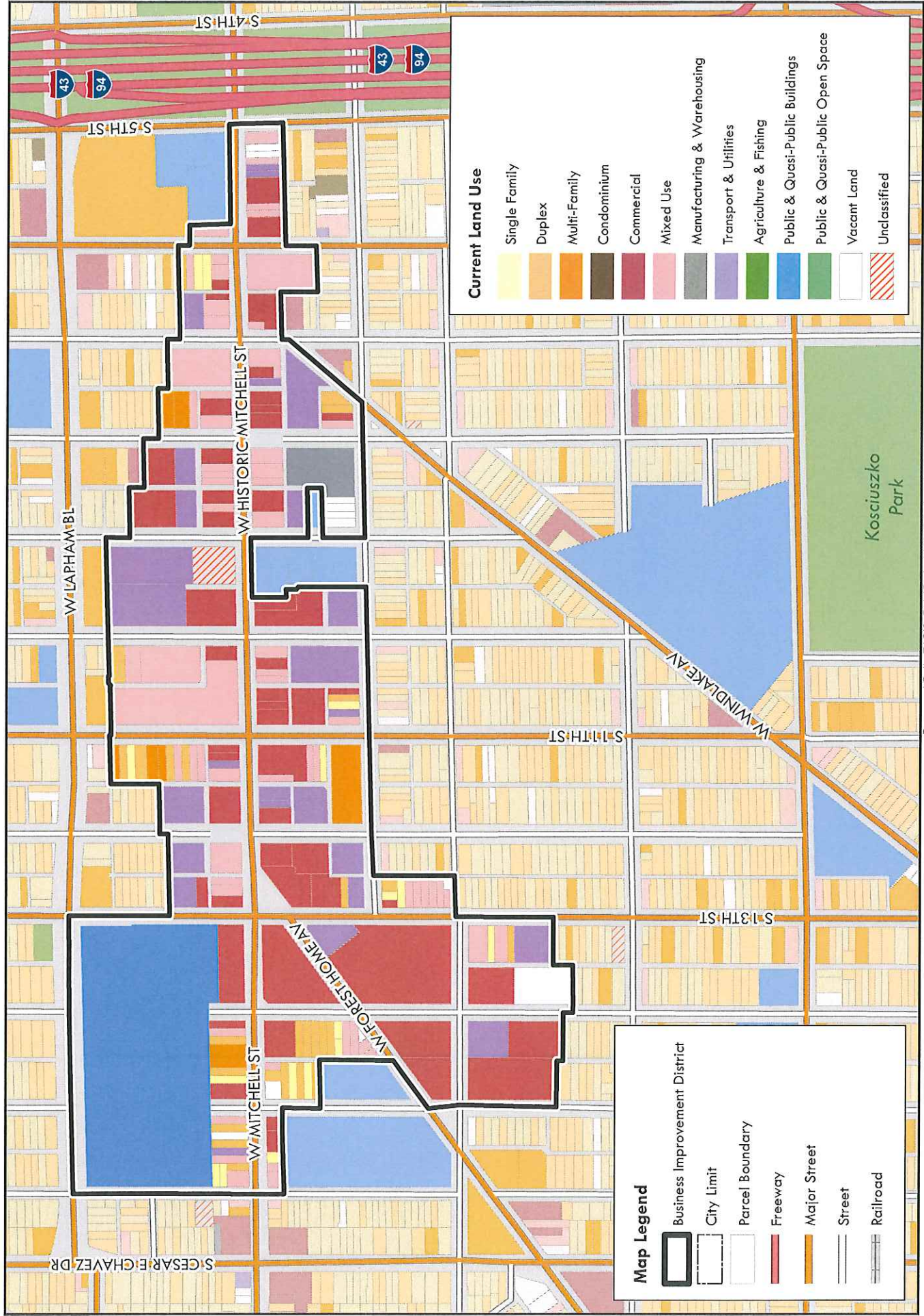
(5)

(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 NO. 4: GREATER MITCHELL STREET

CITY OF MILWAUKEE

Prepared by the Dept. of City Development Planning Division, 7/16/2017
 Source: City of Milwaukee Information Technology Management Division;
 Dept. of City Development Commercial Corridors Team



BUSINESS IMPROVEMENT DISTRICT NO. 4

GREATER MITCHELL STREET

ANNUAL REPORT

2017 - 2018

8/20/2017

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Business Improvement District #4 – Greater Mitchell Street

ANNUAL REPORT

2017-2018

OVERVIEW

Business Improvement District #4 was organized under Wisconsin State Statute 66.1109 (formerly 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 and retail retention with economic initiatives and activities; and to provide maintenance services to maintain a clean, safe and esthetically pleasing business corridor. BID #4 works to promote Mitchell Street businesses and provide support and services to maintain and expand those businesses. In addition, BID #4 regularly communicates to all property and business owners of redevelopment activities, including the City's historic preservation guidelines, and supports, advocates and creates solutions for its approximately 100 commercial property owners. Following are the BID's 2017 accomplishments, and its plans for 2018.

2017 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. Two facade projects were completed in 2017.
- For the seventh consecutive year, BID #4 again sponsored, coordinated and operated another successful Sun Fair on Historic Mitchell Street, June 2-4, to again present the spirit of community to the neighborhood, and to continue to attract destination shoppers to the retailers on the Street. There were seven corporate sponsors and ten vendors and community agencies, who participated, along with the BID's carnival vendor, Rainbow Valley Rides. The event produced a \$9500 net profit to add to the 2017 operating budget.

- Continued the planting and maintenance of the four medians on Historic Mitchell Street, from 5th to 13th Streets. This year, the BID began a 2-year project with the addition of eight flowering planters on the commercial corridor, all to enhance the visual appearance of the Street. Also, the maintenance of the treescaping on the commercial corridor is overseen by the BID.
- Continued on a weekly basis the Street's regular environmental maintenance and cleaning program.
- Continue to retain, expand and attract new businesses, developers and investors to the business corridor. Over the past 18 months, 14 new businesses opened on Mitchell Street. In addition, 4 businesses re-located to other locations in the district, and only two businesses closed.
- 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 previous number of vacant storefronts on the Street to currently nine.
- 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 regularly to continue efforts on safety issues, including panhandling and vagrancy issues, and the speeding problems on Mitchell Street.
- Conducted they annual Fall Open House for business owners and property owners and merchants, which included City departments' representation, agency and business resources, and other strategic resources. This event also provides an opportunity for property and business owners to provide input and comments on the next year's Operating Plan. This is another of the BID's community outreach efforts.
- 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. In 2016, the BID spent \$6573 on graffiti removal, and \$4547 this year through June. The total dollars spent on graffiti removal since 1995 is \$286,867. Graffiti continues to be a major issue in the district, and daily surveillance continues to be needed to remove graffiti as quickly as possible.
- Held a public information meeting in April, conducted by the Wisconsin Historical Society, for the completion of a National Register nomination for the West Historic Mitchell Street Commercial Historic District. It provided property owners information regarding investment in commercial buildings using the Tax Credit program.
- Continued expanding efforts to promote public art activities on the commercial corridor following the successful 2014 "Listening to Mitchell" public art installation on Historic Mitchell Street. In addition, the BID, for the second year, supported the 2016 "Temporary Resurfacing" public outdoor video art event on Historic Mitchell Street. This year, BID #4 was selected by DNS as one of three City BID's to participate in a utility box mural painting project, with two

boxes on Historic Mitchell Street being painted with historic design murals by two separate local artists.

- Completed a 2-year project of installation of new, attractive Ironsites litter containers on Historic Mitchell Street, from 5th to 13th Streets, for a total of 22 new containers. These efforts continue to improve and enhance the appearance and cleanliness of the commercial corridor. The project was completed with the use of TIF funds, and 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, as well as via the BID's Website/Facebook.
- Participate for the fourth year with HMI's "Doors Open Milwaukee" with the newly-opened Mitchell Street Library. The \$10.4 million project by Gorman & Company has re-developed the former Hills Building (910 W. Historic Mitchell Street) into the new MPL branch on the street level with 57 market-rate apartments, the Alexander Apartments, on the upper floors of the building.
- Participated in Marquette University's Community-Based Crime Mapping Class Project, which is a course in the University's Criminology and Law Studies program. The students' final report for our business district provided an important analysis of crime categories over the recent 3-year period.
- Selected by MPD as one commercial corridor for possible involvement in a new program, Project GreenLight, which is a public-private community partnership aimed at improving neighborhood safety, promoting the revitalization and growth of local businesses, and strengthening police efforts to deter, identify and solve crime.
- Coordinated a fifth annual City of Milwaukee Resource Workshop for property and business owners and retailers, providing information on the City's grant programs and other available resource programs and services. It included lending information provided by several financial agencies.
- Continued the BID's Long-Range/Short Range Strategic Planning Committee meetings with Board members, now scheduled throughout the year, for planning 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 seventh consecutive year, for retailers and businesses on Mitchell Street. Judging was done by Board members Alderman, Jose Perez, with the Alderman awarding framed certificates, as well as donated gift certificates to the top three decorated windows.

- Installed for the sixth consecutive year the bright and festive 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 in 2015. 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 business district.
- 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 and the Multicultural Entrepreneurial Institute. The BID sponsored two WWBIC-conducted evening business classes at the BID office for property and business owners and operators. These efforts are in addition to assisting businesses with applications for the City's various Grant programs.
- Supported the Gerald Ignace Indian Health Center with its first annual community Health Fair, held during National Health Month. It should also be noted that RxLink Pharmacy, an independent pharmacy, leased the vacant 1500 sq.ft. retail space on the street level of the Ignace building. That retail addition and the Center's new pediatric dental clinic are scheduled for a late-August opening.
- With the assistance of the Alderman, DPW re-lamped the Mitchell Street lighting on the commercial corridor. The BID regularly monitors the City's public parking lots in the district for problems, lights out, etc.
- Scheduled a "Walk with the Mayor" on Historic Mitchell Street in August, part of Mayor Barrett's 100 miles in 100 days summer neighborhood initiative. It included pop-up ceremonies at the two locations of the recently completed utility boxes historic- designed mural installations.
- Continued involvement with area organizations in their efforts toward a safer and south side: Operation Impact, Journey House, Southside Organizing Committee, MPD District 2
- Re-designed and updated BID #4's Website and Facebook, adding new informational features, news, photos, etc., to further economic development and market the corridor's businesses.
- Cooperated with the City's DPW Infrastructure Administration with the dissemination of information to property owners and businesses regarding the completion of the South 13th Street construction project, from West Forest Home Avenue to West Windlake Avenue.
- Participated in and again supported the 2017 South Side's National Night Out event, August 2.

2018 Goals and Objectives:

- Continue to work closely with the new Milwaukee Public Library in its late 2017 relocation of the Forest Home Library to the Hills Building, another major economic development project for the commercial corridor. This is a major addition to the continuing progress of the rejuvenation of Mitchell Street.
- 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 8th Annual Mitchell Street Sun Fair, June 1-3, to continue to display the spirit of community to the neighborhood, and promote destination and return 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 a safe business neighborhood, with the major 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.
- 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.
- In cooperation with WWBIC, conduct a regular schedule of free business classes for property and business owners and operators.
- Continuing to inform property owners and businesses of current BID #4 activities and developments via Newsletters, special mailings, flyers and letters, and with weekly updating of the BID's rejuvenated Web Site and Facebook. The Web Site also provides information for potential new businesses and retailers to the commercial corridor, and includes a current listing and map of current store fronts and buildings for sale or lease.
- Continue efforts to implement some portions of the revitalization design project for the Street, using the UW-M/CED design concepts developed in 2014. This would include more esthetic additions to the commercial corridor, i.e., flowering baskets and planters, 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.
- Increasing more holiday street lighting, decorations and festivities, to broaden shopping activities and business during the holiday season, all part of the "Holidays on Mitchell Street" annual event.
- Continuing efforts to attract and secure 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, via a survey to be sent to all property and business owners in the district.
- 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. This is in addition to maintaining a current information listing of available commercial spaces on the BID's Web/Facebook.
- Designing a new update of the current BID #4 promotional/marketing pamphlet, to be distributed to brokers and developers.
- Continuing to maintain and improve the four medians on Historic Mitchell Street with additional plantings, mulching, etc., and again adding to the treescaping materials around all of the trees, thereby esthetically improving the visibility and visual appeal of the corridor.
- Expanding the Historic Mitchell Street public art program efforts created over the past three years, with additional events to promote the commercial corridor. A sidewalk art fair and an art walk are under consideration.
- Cooperating with MPD in a possible upgrading of the thirteen surveillance cameras on Historic Mitchell Street, from 6th to 13th.
- Continuing to meet with the City's DPW to improve the commercial corridor's infra-structure problems.

In summary, BID #4 continues to work year-round to make the Historic Mitchell Street commercial corridor a unique, vibrant, clean and safe area to work, shop and visit, by providing necessary support and services to its property and business owners and merchants. And, the Mitchell Street commercial corridor provides an excellent opportunity for future businesses looking to expand or relocate.

BUSINESS IMPROVEMENT DISTRICT NO. 4
FINANCIAL STATEMENTS
FOR THE YEAR ENDED DECEMBER 31, 2016
(With Summarized Totals for the Year Ended December 31, 2015)

BUSINESS IMPROVEMENT DISTRICT NO. 4

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Independent Auditor's Report

Board of Directors
Business Improvement District No. 4

We have audited the accompanying financial statements of Business Improvement District No. 4 which comprise the balance sheet as of December 31, 2016, and the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purposes of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Business Improvement District No. 4 as of December 31, 2016, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Ritz Holman LLP
Serving businesses, nonprofits, individuals and trusts.

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Milwaukee, WI 53202 f. 414.271.7464
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Board of Directors
Business Improvement District No. 4

Report on Summarized Comparative Information

We have previously audited Business Improvement District No. 4's 2015 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated May 19, 2016. In our opinion, the summarized comparative information presented herein as of and for the year ended December 31, 2015, is consistent, in all material respects, with the audited financial statements from which it has been derived.

Other Matter

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The schedule of functional expenses is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the basic financial statements as a whole.



RITZ HOLMAN LLP
Certified Public Accountants

Milwaukee, Wisconsin
March 17, 2017

**BUSINESS IMPROVEMENT DISTRICT NO. 4
BALANCE SHEET
DECEMBER 31, 2016
(With Summarized Totals for December 31, 2015)**

ASSETS	2016	2015
CURRENT ASSETS		
Cash	\$ 27,726	\$ 24,763
Accounts Receivable	577	795
Prepaid Expenses	4,134	2,219
Total Current Assets	\$ 32,437	\$ 27,777
OTHER ASSETS		
Security Deposit	\$ 750	\$ 750
Total Other Assets	\$ 750	\$ 750
FIXED ASSETS		
Equipment	\$ 8,887	\$ 9,231
Accumulated Depreciation	(7,420)	(6,252)
Total Fixed Assets	\$ 1,467	\$ 2,979
TOTAL ASSETS	\$ 34,654	\$ 31,506
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Accounts Payable	\$ 657	\$ 711
Accrued Payroll Liabilities	2,696	3,151
Total Current Liabilities	\$ 3,353	\$ 3,862
NET ASSETS		
Unrestricted		
Operating	\$ 6,301	\$ 2,644
Board Designated	25,000	25,000
Total Net Assets	\$ 31,301	\$ 27,644
TOTAL LIABILITIES AND NET ASSETS	\$ 34,654	\$ 31,506

The accompanying notes are an integral part of these financial statements.

**BUSINESS IMPROVEMENT DISTRICT NO. 4
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED DECEMBER 31, 2016
(With Summarized Totals for the Year Ended December 31, 2015)**

	Unrestricted	
	2016	2015
REVENUE		
Assessment Income	\$ 115,788	\$ 118,096
Interest Income	81	86
Sun Fair Revenue	23,569	18,667
Loss on Disposal of Fixed Assets	---	(440)
City of Milwaukee Trash Can Reimbursement	14,475	12,080
Grants	3,286	3,276
Total Revenue	\$ 157,199	\$ 151,765
EXPENSES		
Program Services	\$ 99,275	\$ 110,768
Management and General	54,267	57,222
Total Expenses	\$ 153,542	\$ 167,990
 CHANGE IN NET ASSETS	\$ 3,657	\$ (16,225)
Net Assets, Beginning of Year	27,644	43,869
 NET ASSETS, END OF YEAR	\$ 31,301	\$ 27,644

The accompanying notes are an integral part of these financial statements.

BUSINESS IMPROVEMENT DISTRICT NO. 4
STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED DECEMBER 31, 2016
(With Summarized Totals for the Year Ended December 31, 2015)

	<u>2016</u>	<u>2015</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in Net Assets	\$ 3,657	\$ (16,225)
Adjustments to Reconcile Change in Net Assets to Net Cash Provided by Operating Activities		
Loss on Disposal of Fixed Assets	---	440
Depreciation	1,512	1,603
(Increase) Decrease in Accounts Receivable	218	(440)
(Increase) Decrease in Prepaid Expenses	(1,915)	1,777
(Increase) Decrease in Security Deposit	---	(750)
Increase (Decrease) in Accounts Payable	(54)	(640)
Increase (Decrease) in Accrued Payroll Liabilities	(455)	1,128
	<u>\$ 2,963</u>	<u>\$ (13,107)</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchase of Fixed Assets	\$ ---	\$ (2,000)
	<u>\$ ---</u>	<u>\$ (2,000)</u>
Net Increase (Decrease) in Cash and Cash Equivalents	\$ 2,963	\$ (15,107)
CASH AND CASH EQUIVALENTS AT BEGINNING OF YEAR	<u>24,763</u>	<u>39,870</u>
CASH AND CASH EQUIVALENTS AT END OF YEAR	<u>\$ 27,726</u>	<u>\$ 24,763</u>

The accompanying notes are an integral part of these financial statements.

BUSINESS IMPROVEMENT DISTRICT NO. 4
NOTES TO THE FINANCIAL STATEMENTS
DECEMBER 31, 2016

BUSINESS IMPROVEMENT DISTRICT NO. 4
NOTES TO THE FINANCIAL STATEMENTS
DECEMBER 31, 2016

NOTE A - Summary of Significant Accounting Policies

Organization

Business Improvement District No. 4 ("BID No. 4") was organized under Wisconsin State Statute 66.608. This statute provides for the formation of Business Improvement Districts (BIDs) upon the petition of at least one property owner in the district. The purpose of a BID is to allow businesses within the district to develop, manage and promote their districts and to establish an assessment to fund these activities. BID No. 4 was organized in 1989 to revitalize Mitchell Street between 5th and 15th Streets in the City of Milwaukee.

BID No. 4 is exempt from tax as an affiliate of a governmental unit under Section 501(a) of the Internal Revenue Code.

Accounting Method

The financial statements of BID No. 4 have been prepared on the accrual basis of accounting.

Basis of Presentation

BID No. 4 reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets. Assets of the restricted classes are created only by donor-imposed restrictions. At December 31, 2016, the Organization's net assets were all unrestricted. The Organization maintains \$25,000 of board designated net assets at December 31, 2016. The net assets have been designated as a reserve before the yearly assessment check is issued. If necessary, the Organization can use those funds to meet cash flow needs.

Cash and Cash Equivalents

For purposes of the statement of cash flows, cash and cash equivalents include all highly liquid debt instruments with original maturities of three months or less when purchased.

Accounts Receivable

Accounts receivable are stated at unpaid balances, less an allowance for doubtful accounts. The Organization provides for losses on accounts receivable using the allowance method. The allowance is based on experience, third-party contracts, and other circumstances, which may affect the ability of customers to meet their obligations. Receivables are considered impaired if full principal payments are not received in accordance with the contractual terms. It is the Organization's policy to charge off uncollectible accounts receivable when management determines the receivable will not be collected.

Allowance for Uncollectible Accounts

Management believes all receivables will be collected in accordance with the terms of the agreements. Thus, no allowance for uncollectible accounts is necessary at year end.

Fixed Assets

All acquisitions of property and equipment in excess of \$500 are capitalized. Fixed assets are recorded at cost. Depreciation is provided over the estimated useful lives of the assets using the straight-line method.

**BUSINESS IMPROVEMENT DISTRICT NO. 4
NOTES TO THE FINANCIAL STATEMENTS
DECEMBER 31, 2016**

NOTE A - Summary of Significant Accounting Policies (continued)

Contributions

All contributions are considered available for the Organization's general programs unless specifically restricted by the donor. Amounts received that are designated for future periods or restricted by the donor are reported as temporarily or permanently restricted support and increase the respective class of net assets. Contributions received with temporary restrictions that are met in the same reporting period are reported as unrestricted support and increase unrestricted net assets. When a restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions. Investment income that is limited to specific uses by donor restrictions is reported as increases in unrestricted net assets if the restrictions are met in the same reporting period as the income is recognized.

Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

NOTE B - Comparative Financial Information

The financial information shown for 2015 in the accompanying financial statements is included to provide a basis of comparison with 2016. The comparative information is summarized by total only, not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity to generally accepted accounting principles. Accordingly, such information should be read in conjunction with the Organization's financial statements for the year ended December 31, 2015, from which the summarized information was derived.

NOTE C - Concentration of Revenue

Business Improvement District No. 4 receives property assessment income and grants from the City of Milwaukee. BID No. 4's operations rely on the availability of these funds. Approximately 85% of the Organization's revenue was from the City of Milwaukee for the year ended December 31, 2016, however, this revenue represents assessments to individual property owners collected by the City.

NOTE D - Accounts Receivable

Accounts receivable consists of fees due from the City of Milwaukee of \$577 as of December 31, 2016.

**BUSINESS IMPROVEMENT DISTRICT NO. 4
NOTES TO THE FINANCIAL STATEMENTS
DECEMBER 31, 2016**

NOTE E - Operating Lease

In February of 2015, the Organization signed a lease for office space starting August 1, 2015, that expires July 31, 2020. Rent expense under this lease was \$9,000 for the year ended December 31, 2016.

The following is a schedule by years of the future minimum payments required under the lease as of December 31, 2016:

<u>Year</u>	<u>Amount</u>
2017	\$ 9,000
2018	9,000
2019	9,000
2020	<u>5,250</u>
Total	<u>\$32,250</u>

NOTE F - Assessment Income

In order to provide revenues to support the Organization's mission, the Common Council of the City of Milwaukee enforced an assessment on property located within a specified area of Mitchell Street. The assessment is calculated based on assessed values of the properties as of every fall. The assessment levied on properties was \$4/1,000 for every dollar of assessed property value with a minimum assessment of \$400 and a maximum assessment of \$2,500 for the year ended December 31, 2016.

NOTE G - Subsequent Events

The Organization has evaluated events and transactions occurring after December 31, 2016, through March 17, 2017, the date the financial statements are available to be issued, for possible adjustments to the financial statements or disclosures. The Organization has determined that no subsequent events need to be disclosed.

**BUSINESS IMPROVEMENT DISTRICT NO. 4
SCHEDULE OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2016
(With Summarized Totals for the Year Ended December 31, 2015)**

	Program Services	Management and General	2016 Total	2015 Total
Salaries and Wages	\$ 31,847	\$ 31,846	\$ 63,693	\$ 64,385
Payroll Taxes	2,851	2,850	5,701	6,712
Professional Fees	---	8,900	8,900	9,000
Supplies	2,330	---	2,330	1,935
Telephone	3,120	---	3,120	4,011
Computer Expense	25	25	50	460
Postage	307	205	512	1,071
Printing	544	---	544	312
Subscriptions	210	236	446	466
Occupancy	4,500	4,500	9,000	12,150
Real Estate Taxes	3,022	3,021	6,043	---
Moving Expense	---	---	---	3,209
Equipment Rental and Maintenance	364	---	364	894
Depreciation	1,512	---	1,512	1,603
Repairs and Maintenance	46	46	92	2,007
Conferences, Conventions and Meetings	1,180	---	1,180	1,294
Utilities Expense	---	---	---	3,431
Insurance	---	2,249	2,249	2,305
Graffiti Removal	6,573	---	6,573	6,552
Marketing and Promotion	1,680	---	1,680	3,260
Sun Fair Expenses	16,335	---	16,335	17,041
Street Maintenance	21,867	---	21,867	23,706
Travel Expense	260	---	260	194
Business Development	---	---	---	27
Community Outreach	399	---	399	1,430
Other Expense	303	389	692	535
Totals	\$ 99,275	\$ 54,267	\$ 153,542	\$ 167,990

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>
Rudy Gutierrez	President	10/21/2015	10/21/2018
Dimity Grabowski	Vice President	7/10/2017	7/10/2020
Gloria Marquez	Treasurer	7/5/2016	7/5/2019
Demitra Copoulos	Secretary	3/13/2017	3/13/2020
Amrit Patel	Member	7/27/2015	7/27/2018
Victor Huyke	Member	5/19/2017	5/19/2019
Jesus E. Nanez	Member	5/1/2015	5/1/2018
John Dye	Member	3/12/2015	3/12/2018
J. Alejandro (Alex) Fuentes	Member	11/29/2016	11/29/2019
Joseph Arnezeder	Member	3/30/2017	3/30/2020
David Rotter	Member	11/07/2014	11/07/2017
Augustin Garnica	Member	3/18/2015	3/18/2018

As of 9/25/2017, 3 vacancies exist on the Board

