



CITY OF MILWAUKEE Comprehensive Plan

Fond du Lac and North Neighborhood Comprehensive Plan

Appendix B: Market Analysis



1. Introduction

The Fond du Lac and North Neighborhood Plan will identify market-driven opportunities and create a plan for redevelopment and reinvestment in the neighborhood based on those market opportunities and public input. One component of the neighborhood plan is a market analysis of the area. This analysis will describe the following neighborhood conditions in terms of housing, retail, commercial and industrial sectors, trends in the neighborhood, assessment of where the market(s) may be heading and what development opportunities exist in the neighborhood.

Information in this section will suggest opportunities for market-driven redevelopment that will have a reasonable chance of success, should minimize the need for public funds and should provide significant tax base and more stable neighborhoods.

The market analysis includes a statistical description of the neighborhood's demographic, institutional, social and governmental characteristics, as well as descriptions of important markets in the neighborhood.

Market sectors included in this analysis are shown below:

- Housing
- Retail
- Commercial/Office
- Industrial

Each section begins with a brief description of conditions in the neighborhood and how the neighborhood compares to other market areas. In most cases, the City of Milwaukee is compared to subsections of the City. The City is also compared to older suburban markets to provide a frame of reference for developers not familiar with the Central City market.

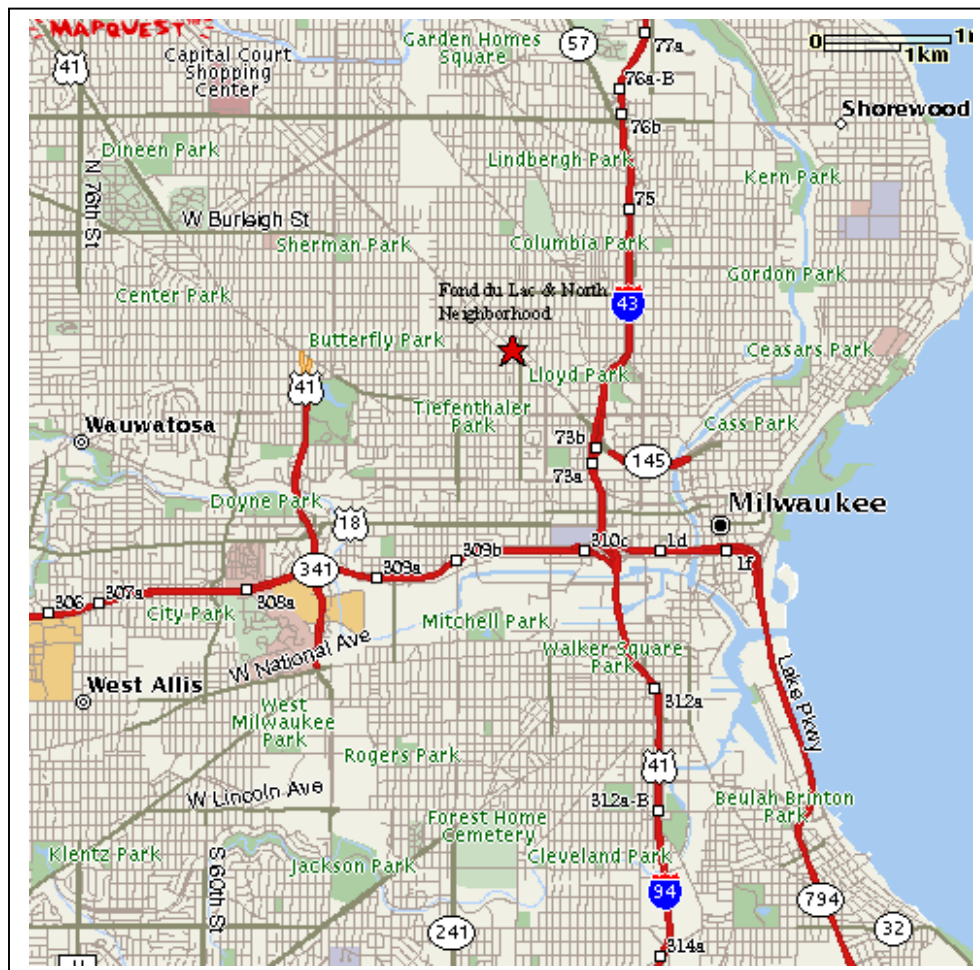
Conditions are analyzed to determine relative strengths and weaknesses of the neighborhood in each market sector. A thorough discussion of market dynamics will follow the analysis of market strengths and weaknesses. The neighborhood is changing in many positive ways. Signs of new development, especially in retail and housing sectors, are appearing. Merely looking at the past and present state of the market may portray an inaccurate picture since new projects are in the process of being developed. The pioneering developments now appearing may be a better indicator of the future potential for the neighborhood. We include a discussion of the market dynamics, largely based on first-hand interviews with business owners, developers and real estate professionals active in the neighborhood, and others knowledgeable about the real estate industry. The sections conclude with discussion of market-driven opportunities.

2. General Description of Neighborhood

The Neighborhood

The Fond du Lac and North neighborhood is located in the near west area of the City of Milwaukee. The neighborhood is bounded on the west by 35th Street, I-43 on the east, Burleigh Street to the north and Galena Street to the south. Map 1 shows the neighborhood's relative location in the City of Milwaukee.

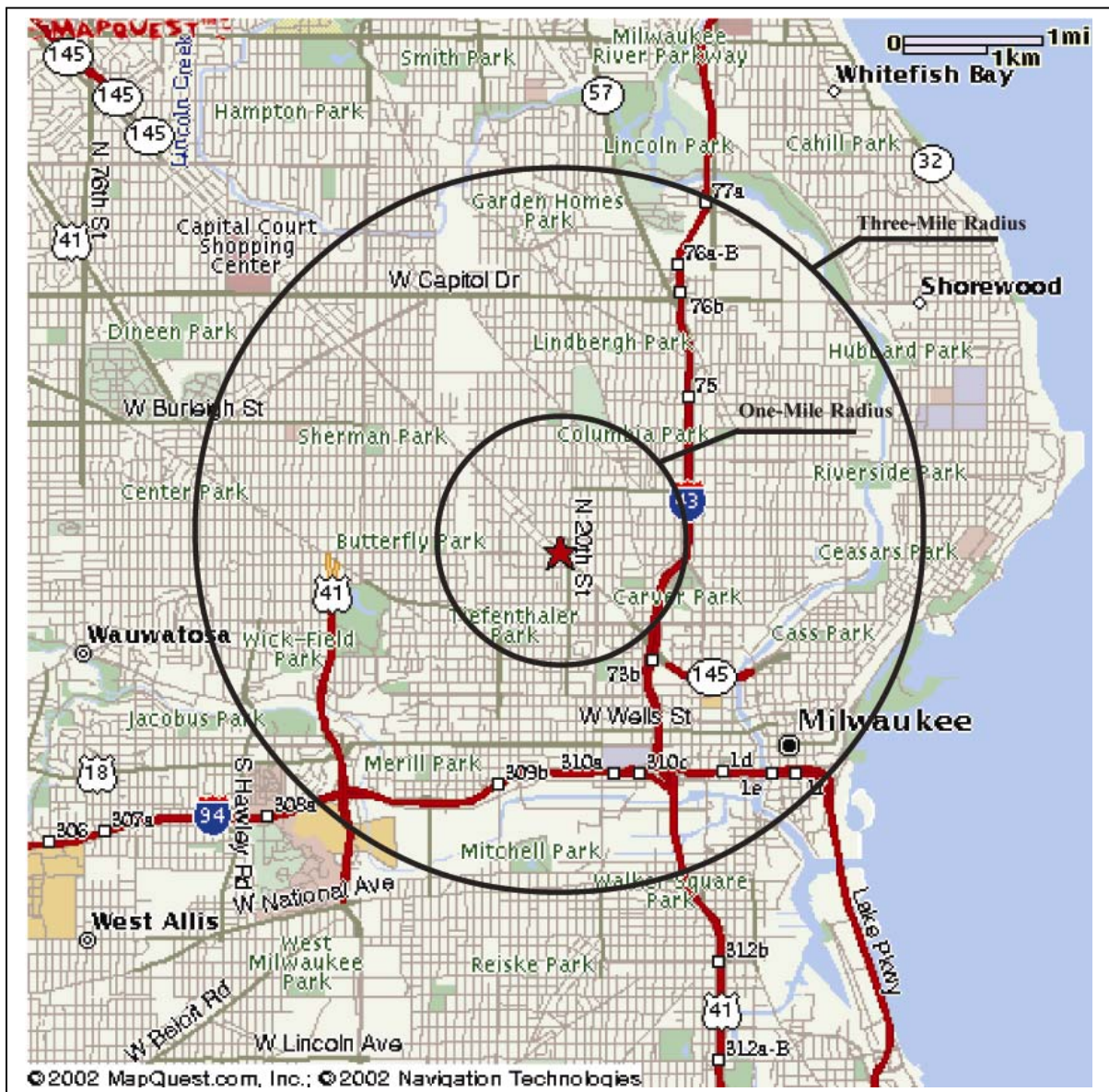
Map 1. Location of Fond du Lac and North Neighborhood within the City of Milwaukee

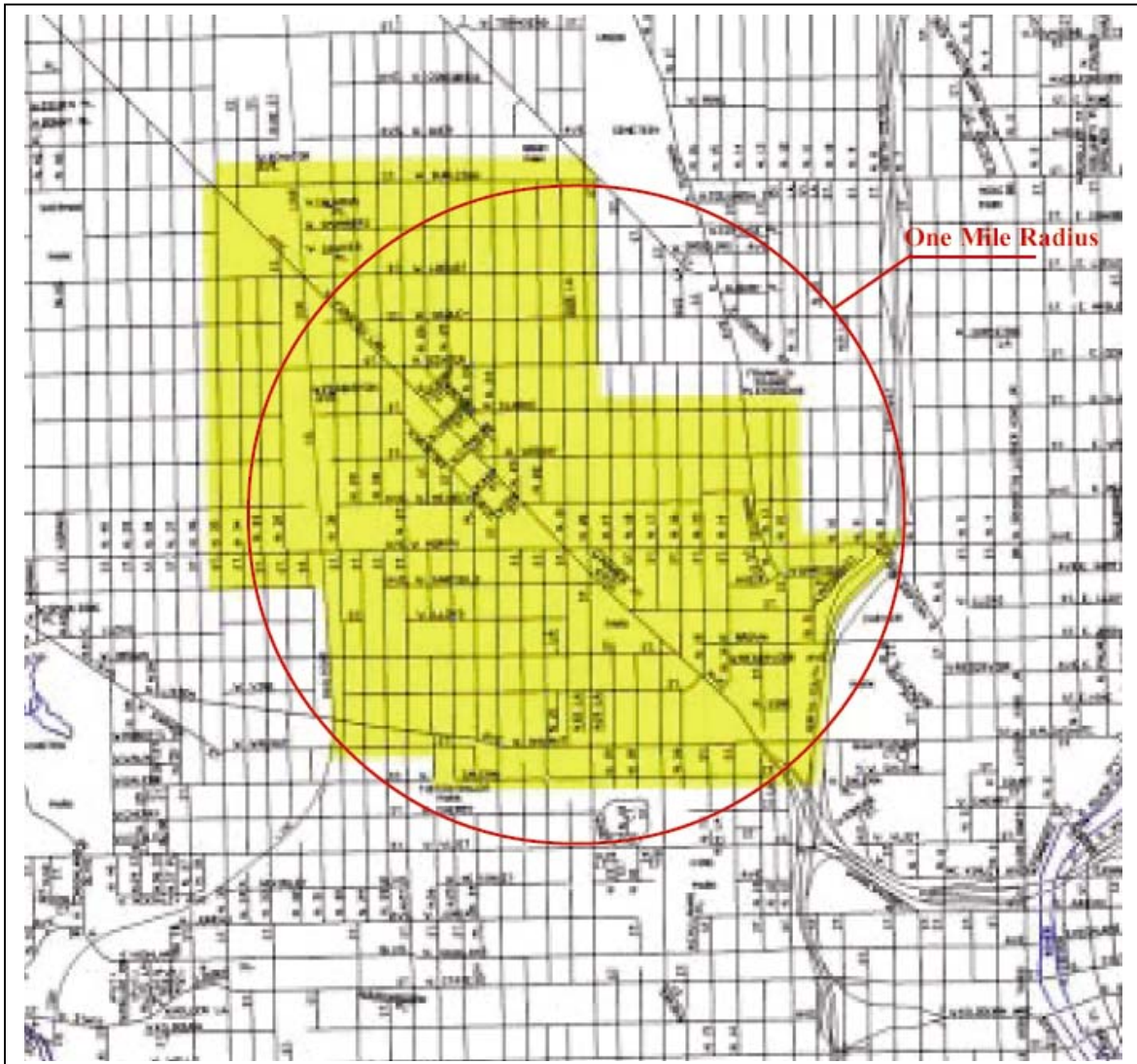


Area of Analysis

The neighborhood housing and retail markets are analyzed using concentric rings of a one and three mile radius from the intersection of Fond du Lac and North Avenues. Demographic, retail sales and consumer expenditure data are used to complete the analysis. The intersection of Fond du Lac and North Avenues was chosen because it represents a major intersection, a point near the center of the neighborhood and an historical location for major retail activity. Map 3 shows the areas included within these areas. Map 4 shows a detailed view of the one mile radius within the Fond du Lac and North neighborhood.

Map 3. One and Three Mile Market Areas



Map 4. Detailed View of the One-Mile Radius

Physical Characteristics

The neighborhood itself can be described as an area containing some of the oldest housing stock in the City of Milwaukee. Originally settled in mid-1800s, the neighborhood is comprised predominately of single-family houses and duplexes. According to the 2000 Census of Housing and Population, the median age of houses in the neighborhood is 59 years, compared to 49 years for the City as a whole. Many of the older homes have not been properly maintained, thus creating the appearance of a neighborhood in poor condition.

The Fond du Lac and North neighborhood includes a mix of land uses: residential, retail, commercial and industrial. Retail development is located along several older strips that include Walnut Street, North Avenue, Lisbon Avenue, Center Street, Burleigh Street, 27th Street, Fond du Lac Avenue and 35th Street. Similar to the housing stock, the

existing retail and commercial stock is some of the oldest in the City of Milwaukee. It is typified by relatively small sized floor plates, small structural bays and office or residential uses above retail uses.

There are a significant number of businesses with a long tenure in the neighborhood. Some of the long term businesses include

- Lena's Foods
- United Auto Parts
- Fred's Doors,
- Gold Rush Chicken
- Jake's Deli
- Columbia Savings & Loan.

Many of these long-term businesses are minority owned and form a strong foundation in the community. These businesses exemplify the spirit and ability to be financially successful in an older urban area populated by low-income households

Commercial office development is almost non-existent in the neighborhood. Some office space exists along retail strips but that space is also characterized by small floor plates with little or no off-street parking. This often means office space is leased to organizations or businesses that cannot afford to pay a lot for higher quality or larger space.

Industrial land use occurs along the 30th Street rail corridor. Here, too, the stock is multi-level, old and inefficient. Industries, today, need building stock that is one story that is outfitted for technology. The existing building stock in the neighborhood is often times under-utilized with uses such as warehousing or cold storage.

The neighborhood has seen evidence of redevelopment and revitalization. Construction of new housing, such as Lindsay Heights and City Homes, exemplifies current redevelopment efforts. New retail businesses have moved or are looking to move into the area, including Jewel-Osco and Auto Zone. Industries are moving into the area, including Start Recycling and Advac Elastomers of Wisconsin, Inc. People throughout the neighborhood have communicated with City staff members and local organizations that people are moving back into "their" neighborhood.

Governmental Services

There are several neighborhood services in the area, including two fire departments and one library. Additional fire, police and library facilities are available in the areas surrounding the Fond du Lac and North neighborhood. These facilities and services are provided in the Tables 1 and 2.

Table 1. Municipal Services Within the Neighborhood

Service	Location
Fire Department	2901 N. 30th Street
Fire Department	1313 W. Reservoir Avenue
Center Street Library	2727 W. Fond du Lac Ave

Table 2. Municipal Services Within the Area of Influence

Service	Location
Fire Department	1551N. 30th Street
Fire Department	2403 N. Teutonia Avenue
5th District Police Dept.	2920 N. 4th Street
7th District Police Dept.	3626 W. Fond du Lac Ave.
Central Library	814 W. Wisconsin Avenue
East Library	1910 E. North Avenue
M. L. King Library	310 W. Locust Street

Parks and Recreation

The Fond du Lac and North Neighborhood has recreational facilities provided by the Milwaukee County Parks System, YMCA, MPS, Boys & Girls Club and the Milwaukee Police Athletic League. Tables 3 and 4 below show the parks within the study area and the area of influence. The largest recreational area is Johnsons Park (13.3 acres) at the northwest corner of North 17th Street and West Fond du Lac Avenue. The park provides the neighborhood with facilities to play football, soccer, softball and basketball, picnic areas with rest rooms and a tot lot. With only 28.1 acres of park land in the neighborhood, this results in 1,799 residents per acre of park land. For comparison, there are 149 residents per acre of park land in the City of Milwaukee. This ratio considers only Milwaukee County Parks land and not the other green spaces in the neighborhood, such as school yards. Looking at how the Fond du Lac and North neighborhood compares with the City of Milwaukee emphasizes how the neighborhood is greatly under served in parks and recreation.

Moody Pool provides an indoor swimming pool and wading pools for the neighborhood.

Table 3. Parks Within the Neighborhood

Johnsons Park	N 17th and W. Fond du Lac
Moody Park	2200 W. Burleigh
Tiefenthaler Park	2501 W. Galena

Table 4. Parks Within the Area of Influence

Carver Park	9111 W. Brown Street
Clas Park	930 W. Wells Street
King Park	1531 W. Vliet Street
Rose Park	3045 N. M.L. King Drive
Sherman Park	3000 N. Sherman Blvd.
Washington Park	1859 N. 40th Street

Education

Milwaukee Public Schools (MPS) offers traditional and innovative public and private school choices. Two schools located in the neighborhood are Brown Street Academy and Twenty-First Street Elementary School. Both MPS schools draw students from throughout the City of Milwaukee. The new YMCA, located at North Avenue and Teutonia Avenue, includes a charter school called the Youth Leadership Academy. It serves students from K-4 through 8th grade. Many of the schools within the neighborhood primarily serve the local community, but also draw from other parts of Milwaukee.

The school system includes independent schools, such as Urban Waldorf, that incorporate movement, art, music and drama into the curriculum to help students learn creative art concepts. The Storms Discovery Learning Center is a year-long, ungraded program that accepts students from various cultural backgrounds, ages and abilities into one classroom. Tables 5 through 9 list the public and private schools located within the neighborhood and the area of influence.

Table 5. Public Elementary Schools Within the Neighborhood

Starms Early Childhood Center	2616 W. Garfield Avenue
21st Street Elementary	2121 W. Hadley Street
Brown Street Academy	2029 N. 20th Street
Clarke Street Elementary	2816 W. Clarke Street
Lee Elementary	921 W. Meinecke Avenue
Lloyd Street Elementary	1228 W. Lloyd Street
Metcalf School	3400 W. North Avenue
Siefert Elementary	1547 N. 14th Street
Wheatley Elementary	2442 N. 20th Street
Urban Waldorf Elementary	2023 N. 25th Street
Starms Discovery Learning Ctr	2035 N. 25th Street

MPS has been implementing the Neighborhood Schools Initiative since the Fall of 2001. This Initiative enables MPS to reduce the number of students that are involuntarily bused by increasing the number of seats available in neighborhood schools. The program will improve parent choice and create desirable schools in every neighborhood.

Table 6. Public Elementary Schools Within the Area of Influence

27th Street Elementary	1312 N. 27th Street
38th Street Elementary	2623 N. 38th Street
Auer Avenue Elementary	2319 W. Auer Avenue
Aurora Weier Education Ctr	2669 N. Richards Street
Douglass Elementary	3409 N. 37th Street
Elm Creative Arts Elementary	900 W. Walnut Street
Franklin Elementary	2308 W. Nash Street
Fratney Elementary	3255 N. Fratney Street
Garfield Avenue Elementary	2215 N. Fourth Street
Green Bay Elementary	3872 N. 8th Street
Holmes Elementary	2463 N. Buffum Street
Hopkins Street Elementary	1503 W. Hopkins Street
Keefe Ave Elementary	1618 W. Keefe Avenue
LaFollette Elementary	3239 N. Ninth Street
MacDowell Montessori	1706 W. Highland Blvd.
Golda Meir Elementary	1555 N. M.L. King Drive
M.L. King Jr. Elementary	3275 N. 3rd Street
Palmer Elementary	1900 N. 1st Street
Pierce Elementary	2765 n. Fratney Street
Story Elementary	3815 W. Kilbourn Avenue
Townsend Street Elementary	3360 N. Sherman Blvd
Westside Academy I	1945 N. 31st Street
Westside Academy II	1940 N. 36th Street
Wisconsin Ave Elementary	2708 W. Wisconsin Ave.

Table 7. Public Middle and High Schools Within the Area of Influence

Douglas Comm. Academy	3620 N. 18th Street
Malcolm X Middle	2760 N. 1st Street
Milwaukee Education Ctr.	227 W. Pleasant Street
Milwaukee Village School	1011 W. Center Street
Robinson Middle	3245 N. 37th Street
Roosevelt Creative Arts Middle	800 W. Walnut Street
Scott Middle	1017 N. 12th Street
Grand Ave Middle/High	2430 W. Wisconsin Ave
Milw High School of the Arts	2300 W. Highland Blvd.
North Division	1011 W. Center Street
Washinton High	2525 N. Sherman Blvd

Table 8. Private Schools Within the Neighborhood

Emmaus Lutheran School	2818 N. 23rd Street
St. Leo Catholic Urban Academy	2458 W. Locust Street
Shalom High School	1749 N. 16th Street

Table 9. Private Schools Within the Area of Influence

Beautiful Savior Lutheran	3012 N. Holton Street
Harambee Community School	110 W. Burleigh Street
Indian Community School	3121 W. State Street
Marva Collins Preparatory School	2449 N. 36th Street
Siloah Lutheran School	3721 N. 21st Street
St. Marcus Lutheran School	2215 N. palmer Astreet
Urban Day School	1441 N. 24th Street

Medical Services

A review of business listings does not show any physicians, clinics or hospitals located in the neighborhood, however, there are 19 clinics and 2 hospitals within a ten minute drive of the neighborhood.

However, residents do not have access to medical care within their neighborhood. According to an Employment and Training Institute study of transportation barriers, only an estimated 60% of inner city residents use a car to travel to and from work. Such evidence confirms, then, that a large number of inner city residents do not have access to a car. Since 40% of neighborhood residents do not own a car, this may make it difficult to get medical care. In order to receive medical care, residents must use public transportation or find someone who owns a car to drive them to a facility outside of the neighborhood. The medical facilities within the area of influence are listed in Tables 10 and 11.

MPS is working to provide some form of medical services at its neighborhood schools, space permitting, and also dependent upon finding a medical partner to establish a clinic or service at the school. Clinics currently operate at LaFollette and Wheatley Schools. Medical services have been suspended at Todd Wehr Community Center, however, efforts are being made to bring them back. These services are shown in Table 12.

Table 10. Medical Services Within the Area of Influence

27th Street Community Health Ctr	930 N. 27th Street
Columbia Family Care Ctr	
Medical Collge of WI Clinics	210 W. Capital Drive
Diverse Clinical Services Assoc.	633 W. Wisconsin Ave.
Douglas Community Health Ctr	3620 N. 18th Street
Family Medical Clinic	3316 W. Wisconsin Ave.
Family Practice	2040 W. Wisconsin Ave.
Gambro Healthcare-WI Ctr	3801 W. Wisconsin Ave.
Hillside Family Health Ctr.	1452 N. 7th Street
Internal Medicine Assoc.	1218 W. Kilbourn Avenue
LaFollette Elementary School	3239 N. Ninth Street
Lisbon Ave Community	3522 W. Lisbon Avenue
MLK Heritage Health Ctr	2555 N. MLK Drive
Milwaukee Immediate Care Ctr	1971 W. Capital Drive
Pediatric and Adolescent Clinic	1020 N. 12th Street
Pain Mgmt Ctr of WI & Planned Parenthood	2040 W. Wisconsin Ave.
Rainbow Health Ctr	2619 W. State Street
Shafi Medical Center	1218 W. Kilbourn Avenue
St. Ben's Clinic for the Homeless	1027 N. 9th Street
Wisconsin Ave Family Care	1834 W. Wisconsin Ave.

Table 11. Hospitals Within the Area of Influence

Sinai Samaitan Medical Ctr	945 N. 12th Street
St. Joseph's Hospital	5000 W. Chambers St.

Table 12. Limited Medical Services Within the Neighborhood

Capital Christian Center	2474 N. 37th Street
Todd Wehr Community Center	3400. W. North Avenue
Wheatley Elementary	2442 N. 20th Street

Child Day Care

Several Child Day Care services are located within the neighborhood and area of influence. Table 13 demonstrates day care capacity by the two primary zip codes within the neighborhood. Looking at an estimated total population within a one-mile radius of Fond du Lac and North, there are approximately 3,317 children between the ages of 0-4. Since this group is unlikely to attend school, they are the group most in need of day care services. Total capacity of both group centers and family providers is 3,771. Stakeholder interviewees familiar with daycare services in the neighborhood indicated that an adequate supply of daycare exists to meet current and future demand within the neighborhood. However, others have told us that need still exists for daycare. Daycare services for children with special needs is one service lacking in the neighborhood. Special needs daycare may be difficult to find within the neighborhood because providers may lack proper facilities to provide service, have concerns about providing care, are unaware of the social service agencies that can assist with special needs children and therefore causes an unconscious bias against children with special needs.

Table 13. Daycare Capacity

Zip Code	# of Centers	Total Capacity	# of Family Providers	Total Capacity
53206	14	822	238	1537
53205	7	1029	60	383
Total	21	1851	298	1920

Source: 4C-Community Coordinated Child Care

Community Organizations

There are organizations located within the neighborhood that play an important role in providing services to the community. Table 14 lists most of the community organizations that are active within the Fond du Lac and North neighborhood.

Table 14. Community Organizations

Organization	Location	Type of Service
WAICO/YMCA	2200 N. 12th Street	Recreation/ Learning
Boys and Girls Clubs:		
Augusta M. LaVarnway Club	2739 N. 15th Street	Recreation/Learning
Siefert Elementary	1547 N. 14th Street	Community Learning Ctr
Clarke Street Elementary	2816 W. Clarke Street	Community Learning Ctr
Roger & Leona Fitzsimonds Club	3400 W. North Avenue	Recreation/Learning
Police Athletic League	6680 N. Teutonia Ave	Recreation/Learning
North Avenue CDC	3624 W. North Avenue	Business
OIC	2947 N. M.L. King Drive	Business
Hunger Taskforce	201 S. Hawley Ct.	Neighborhood Services
Project Respect	2947 N. M.L. King Drive	Neighborhood Services
Amani Pastor's Group		Neighborhood Services
Metcalfe Park Residents Assoc.	2447 N. 34th Street	Neighborhood Services
Mid-Town Neighborhood Assoc.	2501 W. Galena Street	Neighborhood Services
Sherman Park Community Assoc.	3526 W. Fond du Lac	Neighborhood Services
Lisbon Avenue Neighborhood Development Corp.	1952 N. 36th Street	Business
New Covenant Housing Corp.	2331 N. 39th Street	Housing/Social Services
Walnut Way Group		Housing/Social Services
30th Street Industrial Corridor	3536 W. Fond du Lac	Business
CFN/Fond du Lac & North Business Association		Business
ACTS and the Dominican Center	1445 N. 24th Street	Neighborhood Services
Habitat for Humanity	2233 N. 30th Street	Housing/Social Services

Churches

There are many churches that serve the Fond du Lac and North neighborhood. Churches are an integral part of the community. Churches are involved with the development of affordable housing, providing day care and participating in the economic development of the community. Table 15 provides a list of churches within the neighborhood.

Table 15. Churches Within the Neighborhood

Church Name	Location
Abundant Life Ministry	2201 N. 35th Street
All Nation House of Prayer Christian Center	2233 W. Fond du Lac Avenue
Ark of Praise Church	3201 N. 28th Street
Azareel Temple Church of God in Christ	2517 W. Fond du Lac Ave
Bethel Baptist Church	2014 & 2030 W. North Ave
Bethel Christian Methodist Episcopal Church	3281 N. 26th Street
Bethesda Baptist Church	2805 W. North Avenue
Body of Christ Fellowship	2429 W. Fond du Lac Avenue
Bradford Memorial AME Church	2478 N. 24th Street
Capital Christian Center	2474 N. 37th Street
Christ Mission CME Church	1603 W. Clarke Street
Christ Presbyterian Church	1930 W. Walnut Street
Christian Liberty Church of Holiness	2544 N. 27th Street
Church Ministry Enterprises	3055 N. 24th Place
Committed to Christ Christian Church Fellowship	2035 W. Fond du Lac Ave
Corinth Missionary Baptist Church	1874 N. 24th Place
Covenant Community Church	3033 W. Burleigh Street
Cross Lutheran Church	1821 N. 16th Street
Damascus Baptist Church	2447 N. 27th Street
Divine Temple Church of God in Christ	2754 N. 30th Street
Ellison Chapel AME Church	2100 W. Clarke Street
El-Shaddai Church of God in Christ	2976 N. 27th Street
Emmaus Lutheran Church School & Child Care	2818 N. 23rd Street
Faith Tabernacle Church	1118 W. North Avenue
Faith Temple	2460 W. Fond du Lac Ave
Faith Temple Church of God in Christ	2482 W. Center Street
Faith Temple Pentecostal Church	2807 W. Hadley Street &
Faith Temple Pentecostal Church	2416 W. Lisbon Avenue
First Bible Missionary Baptist Church	2659 N. 22nd Street
Gethsemane Baptist Church	2619 W. Center Street
God's Community Project	2479 N. 20th Street
God's Creation Ministries	3100 W. Lisbon Avenue
Going Up Yonder Community Church	2601 W. North Avenue

Goodway Baptist Church	1734 W. Galena Street
Greater Faith Outreach Ministries	1934 W. North Avenue
Greater Little Hill Church of God in Christ	2480 W. Locust Street
Greater New Birth YCM House	3210 W. Center Street
Guiding Light Church	2235 W. Brown Street
Hephatha Lutheran Church	1720 W. Locust Street
Holy Ghost Baptist Church	2617 N. 15th Street
Holy Mount Carmel Missionary Baptist Church	2127 W. Garfield Avenue
Hopewell Missionary Baptist Church	2375 N. 25th Place
Israel Missionary Baptist Church	3719 W. Center Street
Jericho Missionary Baptist Church	1923 N. 12th Street
Jones Temple	2418 N. 19th Street
Kingdom Baptist Church	2617 W. Fond du Lac Ave
Lighthouse Gospel Chapel	3512 W. North Avenue
Lively Stone Deliverance Center	3527 W. North Avenue
Monumental Missionary Baptist Church	2407 W. North Avenue
Mount Pilgrim Missionary Baptist Church	2345 N. 18th Street
New Foundation Missionary Baptist Church	1404 W. Center Street
New Nation Temple	2614 W. Center Street
New Paradise Missionary Baptist Church	2353 W. Fond du Lac Ave
New Revelation Full Gospel Baptist Church	2878 N. 27th Street
New Testament Central City Church	2400 W. Center Street
Newport Missionary Baptist Church	2237 N. 11th Street
Northside Lutheran Ministries	2533A W. North Avenue
Paradise Sanctuary Missionary Baptist Church	2701 W. Clarke Street
Pentecostal Power	2331 W. Center Street
Philadelphia Baptist Church	2033 W. Cherry Street
Pleasant Hill Missionary Baptist Church	2434 W. Locust Street
Reformation Church of Holiness	2979 N. 21st Street
Reformation Church of Holiness	2606 W. Fond du Lac Avenue
Reformation Lutheran Church	2201 N. 35th Street
Rehoboth Miracle Temple Church of God in Christ	2804 N. 29th Street
Resurrection Life Church Ministries UHCA	2034 W. Center Street
Revival Center Tabernacle	1312 W. Garfield Avenue
Second House of Prayer	3110 N. 27th Street
Solid Rock Pentecostal Church	2800 W. Center Street
Southern Rose Missionary Baptist Church	2456 N. 16th Street
Spiritual Israel Church	2415 W. Fond du Lac
St. Emmanuel Church of God in Christ	2245 N. 24th Place
St. Gabriel Church of God in Christ	2623 W. Fond du Lac Avenue
St. Paul Church of God in Christ	2479 N. 15th Street
The Lord's Church	2140 N. 27th Street
Trinity Missionary Baptist Church	3057 N. 35th Street
Trophies of Grace Fellowship	2004 N. 32nd Street
True Tabernacle of the First Born	2487 W. Fond du Lac Ave
United Baptist Church	2535 W. Hadley Street
Unity Gospel House of Prayer	1747 N. 12th Street
Victory Baptist Church	1310 W. Hopkins Street
Walden Spiritual Chapel Church	1633 W. Center Street

3. Demographics

The following tables provide a summary of the Fond du Lac and North neighborhood's demographics and how the area compares to the City of Milwaukee and surrounding areas. The information presented here is intended to assist business location by providing a snapshot of characteristics that may help businesses, persons or other agencies looking to locate a business in the neighborhood.

Population Change

The Fond du Lac and North neighborhood experienced a 26.2% decline in population between the 1990 and 2000 U.S. Census, this is five times that of the City of Milwaukee. Table 16 shows the change in population between the 1990 and 2000 Census for the neighborhood and surrounding communities. Other areas within Milwaukee County, including the City of Milwaukee, West Allis and Wauwatosa have also experienced a 3% to 5% decline in population during the same time period.

Table 16. Comparison of Neighborhood Population Change with Other Areas

Area	1990	2000	% Change
Neighborhood	68,502	50,558	-26.2%
City of Milwaukee	628,088	596,974	-5.0%
Milw County excluding City	331,187	343,190	3.6%
City of West Allis	63,221	61,254	-3.1%
City of Wauwatosa	49,366	47,271	-4.2%

Source: 1990 and 2000 U.S. Census

Decline in population may have different implications for housing development, retail development and business office development. One implication is that the current decline in population is causing the demand for goods, services and housing to shrink, which impacts merchants in the area.

Diversity

In the mid-1800s, the Fond du Lac and North Avenue area was home for the many Germans that immigrated into the City. This cultural emphasis changed in the 1920's when African Americans began moving into the neighborhood. Quota laws and World War II had slowed immigration into the United States, however, the American economy was in high gear after the war with many jobs opening in manufacturing. As economic opportunities emerged, African Americans moved into the City of Milwaukee and settled first in the Halyard Park neighborhoods around the intersection of North Avenue and Martin Luther King Drive. As the African American population grew, people moved west to the Fond du Lac and North Avenue neighborhood. For more details, see The Making of Milwaukee by John Gurda

Demographic data for the neighborhood was obtained for areas within a one, three and five-mile radius surrounding the intersection of Fond du Lac and North Avenue. A five-mile radius indicates about a 10 minute drive and therefore a basis for judging the potential customer base for neighborhood or community goods and services. Table 17 shows the population distribution by race within the neighborhood.

Table 17. Neighborhood Population by Race

Population	1 Mile Radius	%	3 Mile Radius	%	5 Mile Radius	%
Total	29,618		253,686		506,237	
White	697	2.4%	77,991	30.7%	228,888	45.2%
Black	26,230	88.6%	139,199	54.9%	185,136	36.6%
Asian/Pacific Islander	1,316	4.4%	8,209	3.2%	15,040	3.0%
Native American	71	0.2%	1,449	0.6%	3,550	0.7%
Other	10	0.0%	395	0.2%	767	0.2%
Hispanic	807	2.7%	21,822	8.6%	63,994	12.6%

Source: 2000 U.S. Census

The 2000 U.S. Census shows that the neighborhood has a much larger African American and somewhat larger Asian/Pacific Islander population than the City of Milwaukee and Milwaukee County. Table 18 below shows the population distribution within the neighborhood, the City of Milwaukee and Milwaukee County.

Table 18. Comparison of Population by Race as a Percentage of Total Population

Population	Project Area	City of Milwaukee	Milwaukee County
Total	50,558	596,974	940,164
White	3.6%	50.0%	65.6%
Black	88.3%	37.3%	24.6%
Asian/Pacific Islander	4.9%	3.0%	2.6%
Native American	0.3%	0.9%	0.7%
Other	1.1%	6.1%	4.2%
Two or More Races	1.8%	2.7%	2.2%
Hispanic	2.5%	12.0%	8.8%

Source: 2000 U.S. Census

Income

Examination of income statistics presents a mixed view of the neighborhood. On one hand, the population is generally poorer than the City as a whole and is falling behind over time. On the other hand, the strong concentration of buying power within the neighborhood presents an opportunity for all sector and product groups. Table 19 shows the percentage of neighborhood households within each income bracket. Data from this table indicates a substantial portion of the households, 42% within a one-mile radius of Fond du Lac and North, had annual income in 1999 of less than \$14,999. However, the

further you move out from Fond du Lac and North the amount of people in the less than \$14,999 level decreases, with only 24% at the five-mile radius.

Although households in the immediate vicinity of Fond du Lac and North have the lowest incomes, incomes rise in the three-mile and five-mile radii from the Fond du Lac and North Avenue intersection. Within a one-mile radius, 28% of the population has a household income of \$35,000 or more. Within a five-mile radius, the percentage of households with an income of \$35,000 or more increases to approximately 46%.

Overall, 30% of the households have an income between \$15,000 and \$34,999 throughout the neighborhood. From this data we know that households outside of the neighborhood have more buying power, which enables them to pay higher rents and mortgages. As households are able to invest more into higher rents and mortgages, housing quality improves. (Maps 14, 16 and 18 in the Housing section show the average assessment value for duplexes, single-family homes and average combined assessed value. These maps show higher assessed values, particularly to the northwest of the neighborhood.)

Table 19. Household Income as a Percentage of Neighborhood Households

	1 Mile Radius	3 Mile Radius	5 Mile Radius
Less than \$14,999	44.5%	29.5%	23.1%
\$15,000 - \$34,999	34.0%	32.6%	30.9%
\$35,000 - \$49,999	9.3%	15.1%	16.5%
\$50,000 - \$74,999	8.3%	12.9%	15.7%
\$75,000 - \$99,999	2.0%	5.5%	7.3%
\$100,000 - \$149,999	1.4%	2.9%	4.2%
\$150,000 and more	0.7%	1.5%	2.4%
Average Household Income	\$ 26,311	\$ 36,198	\$ 43,368

Source: 2000 U.S. Census

The 2000 U.S. Census indicates the 1999 median household income for the neighborhood was \$19,804, with the median household income for the City being \$32,216 in 1999. The 1990 U.S. Census showed that the 1989 median household income for the neighborhood was \$17,683 while the median household income for the City of Milwaukee was \$23,627 in 1989.

The median household income data reflects that half of the households in the neighborhood have an income below \$19,804.

Table 20 shows the change over the past ten years in median household income for the neighborhood and the City of Milwaukee. Milwaukee's median household income showed an increase of 28.3% compared to an increase of 11.5% in household income within the neighborhood. The Consumer Price Index (CPI) was used to estimate what the median household income should be based on inflation for the City and the

neighborhood. In 1999, the median household income for the City of Milwaukee should be \$32,999 (actual is \$32,216) while the neighborhood should have a median household income of \$24,697 (actual is \$19,804). A comparison of these incomes with those gathered by the 2000 U.S Census shows that City household incomes reflect the rate of inflation while neighborhood household incomes are below.

Table 20. Comparison of Median Household Income

	City of Milwaukee	Neighborhood	% of the City
1990	\$ 23,627	\$ 17,683	74.8%
2000	\$ 32,216	\$ 19,804	61.5%
% Change	26.7%	10.7%	

Source: 1990 U.S. Census, 2000 U.S. Census

Purchasing Power

Median income is not the only factor in determining the purchasing power of a neighborhood. Population and income per square mile are also significant contributors. A combination of household income, disposable income, and density create purchasing power, which can then be further defined to determine specific retail opportunities within market sectors.

Two sub-neighborhoods in the neighborhood are compared to the other areas around Milwaukee. The two sub-neighborhoods were defined by the Employment and Training Institute at UW-Milwaukee using a three-mile radius around the intersection of 35th Street and North Avenue and a three-mile radius around the intersection of Fond du Lac and North Avenue.

The area around the intersection of Fond du Lac and North Avenue area has 13,288 people per square mile and an income per square mile of approximately \$72 million. The area around the intersection of 35th Street and North Avenue has 14,229 people per square mile and an income per square mile of approximately \$98 million. In comparison, the City of West Allis and Wauwatosa each have an income per square mile of approximately \$88 million. Milwaukee County, excluding the City of Milwaukee, has an income per square mile of \$55 million. Looking at the income per square mile of these two sub-neighborhoods, parts of the Fond du Lac and North neighborhood have a higher income per square mile and density than the City of West Allis, the City of Wauwatosa and the rest of Milwaukee County.

Table 21 shows the differences in income per square mile and the people per square mile.

Table 21. Comparison of Income per Square Mile and Density

Area	Income/ Square Mile	People/ Square Mile
Fond du Lac & North Ave	\$72,287,561	13,288
35th Street & North Ave	\$97,870,904	14,229
Milw County excluding City	\$55,086,406	2,389
City of West Allis	\$88,106,374	5,605
City of Wauwatosa	\$87,165,586	3,702

Source: Employment and Training Institute at the University of Wisconsin-Milwaukee, Milwaukee Department of City Development

Age Characteristics

The neighborhood has a higher percentage of children under the age of 19 than the City and County of Milwaukee, and a much lower percentage of persons aged 65 and over than the City or County.

Within a one-mile radius of Fond du Lac and North Avenues, approximately 47% of the population is under 19. Within a three mile radius, the percentage of children under the age of 19 is 34.1%. For comparison, the City of Milwaukee has approximately 32.2% of its population under the age of 19 and approximately 29.3% of the County’s population is under the age of 19. Between 11-13% of the City and County’s population is over the age of 65 while less than 10% of the Fond du Lac and North neighborhood’s population is 65 and older.

Table 22 shows the age distribution throughout the neighborhood, City of Milwaukee and Milwaukee County. This feature, a high concentration of buying power, has important ramifications for retail development opportunities. Please see Section 5.

Table 22. Comparison of Population by Age as a Percentage of Area’s Total Population

	1 Mile Radius	3 Mile Radius	5 Mile Radius	City of Milwaukee	Milw County
Under 5	10.7%	7.9%	7.9%	8.0%	7.1%
Ages 5-19	36.5%	26.2%	24.9%	24.2%	22.2%
Ages 20-24	6.7%	10.9%	8.9%	8.7%	7.4%
Ages 25-34	11.9%	16.4%	15.9%	15.8%	15.0%
Ages 35-44	12.7%	13.8%	14.6%	14.4%	15.3%
Ages 45-54	8.7%	10.7%	11.6%	11.4%	12.6%
Ages 55-64	5.6%	6.0%	6.3%	6.6%	7.4%
Ages 65 and over	7.3%	8.2%	9.9%	10.9%	12.9%
Median Age	22.1	28.1	30.3	30.6	33.7

Source: 2000 U.S. Census

The Fond du Lac and North neighborhood has a relatively young population which can play a key role for future development in the neighborhood. For example, as the neighborhood population ages, there may be greater need for senior housing and nursing care. The higher percentage of individuals between the ages of 5-17 and 25-44 will influence the types of retail businesses that may move into the market and a need for education and jobs.

Auto Ownership

Another factor that impacts redevelopment and reinvestment in the neighborhood is auto ownership, or vehicle availability.

Table 23 below shows that in the 2000 Census, approximately 42% of the occupied housing units within the neighborhood did not have access to a car compared to 21% for the City as a whole. Many residents, therefore, utilize public transit to access goods and services, and for travel to employment, shopping, education, recreation and services. This neighborhood lends itself to mobility via public transit and is well served by public transit. However, there are a large number of duplexes in the neighborhood. This may cause the number of occupied units used to determine vehicle availability artificially low.

Table 23. Vehicles Available By Occupied Housing Units Within the Neighborhood

Cars per Occupied Housing Units	No Cars	One Car	Two Cars	Three Cars	Four Cars	Five or More Cars
Owner Occupied Units	1153	2406	1494	437	116	45
Renter Occupied Units	5828	4107	989	148	32	64
Total Occupied Units	6981	6513	2483	585	148	109
% of Units with Vehicles	41.51%	38.72%	14.76%	3.48%	0.88%	0.65%

Source: 2000 U.S. Census

A recent study conducted by the Employment and Training Institute entitled, "Removing Transportation Barriers to Employment: Assessing Driver's License and Vehicle Ownership Patterns of Low-Income Populations," showed similar findings. Approximately 60% of inner city workers had access to a car to get to and from work while over 90% of suburban workers had access to vehicles. A high level of transit utilization continues to exist in the neighborhood. This has several implications, first, lack of mobility implies that opportunities within the neighborhood for day-to-day goods and services may be enhanced because many people cannot easily travel outside the neighborhood to obtain them. Secondly, providers of these goods and services should locate on public transit lines to maximize their potential accessibility to the neighborhood.

Bus Ridership

In 2000, 41% of the residents in the Fond du Lac and North neighborhood did not own or have access to a car. Therefore, access to public transit becomes an important consideration for future development. We examined the neighborhood to identify the nine transit routes and major stops.

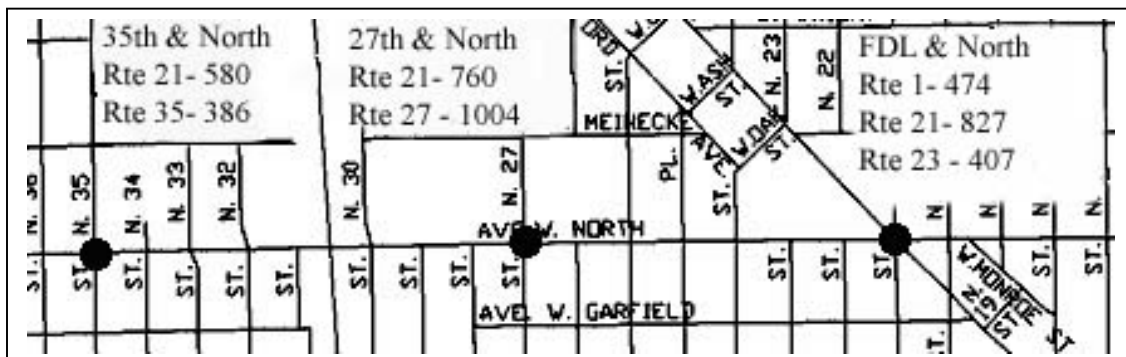
The Milwaukee County Transit System provided data on average bus ridership between 2000 and 2001. Maps 5 through 7 below show the bus ridership for the primary activity nodes within the neighborhood. The “dots” indicate the nodes and the tabular data indicate the routes and their average daily passengers.

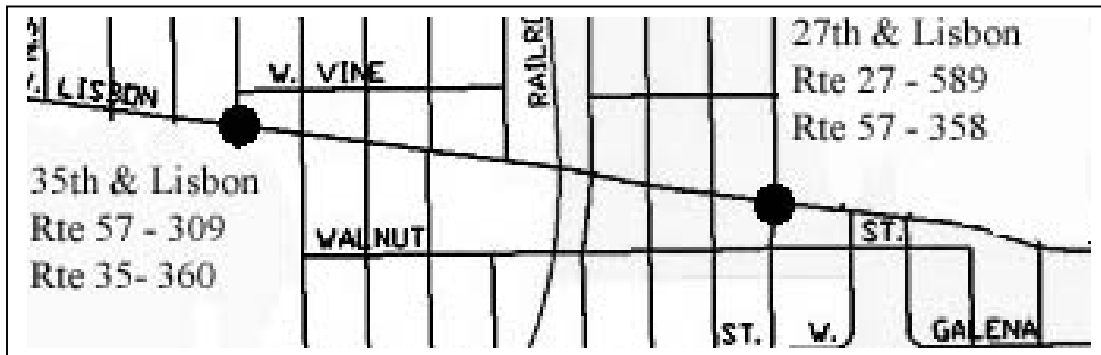
Bus routes in the neighborhood experience heavy ridership compared to the rest of the metro area. Several intersections function as significant transit nodes because of heavy bus ridership and bus transfers. The most intensely utilized bus stops or transfer points were along 27th Street.

The intersections of 27th Street and Fond du Lac Avenue, Fond du Lac and North Avenue, and Fond du Lac and Center Street were, in that order, the busiest stops in the neighborhood. The stop at 27th Street and Fond du Lac Avenue has three routes servicing that stop with approximately 2,630 average daily passengers getting on and off a bus at that stop. The stop at Fond du Lac and Center Street has two routes servicing it and an average of 1,010 passengers per day. The stop at 27th and North Avenue also has two routes servicing that point with 1,764 average daily passengers. Finally, the stop at Fond du Lac and North Avenue is serviced by three bus routes with 1,708 average daily passengers.

A detailed spreadsheet showing the number of people on and off at particular stops is provided in Appendix 1.

Map 5. Bus Ridership Along North Avenue



Map 6. Bus Ridership Along Lisbon Avenue**Map 7. Bus Ridership Along Center Street and Fond du Lac Avenue**

Traffic Counts

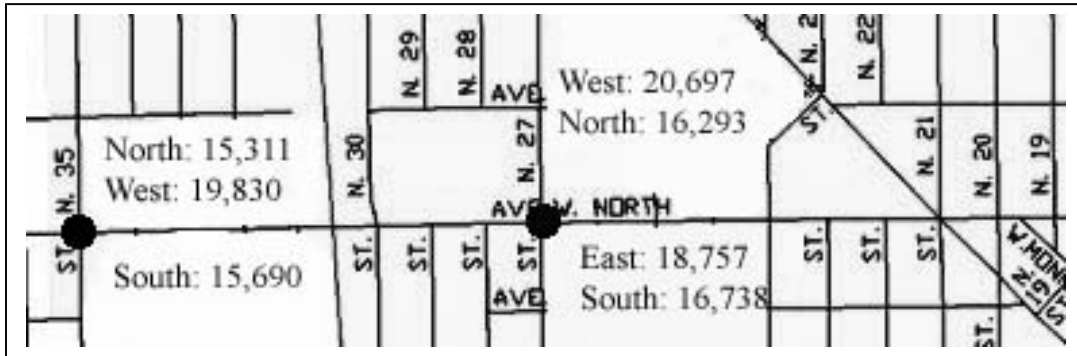
Traffic counts are one measure of potential customers passing by a location. The potential customer base is not only those residents living in the neighborhood with access to a privately-owned vehicle, but also those individuals driving through the neighborhood. High traffic counts indicate areas with a potentially large customer base and high accessibility.

Maps 8 through 12 show a 24-hour weekday traffic count for intersections within the retail nodes of the neighborhood.

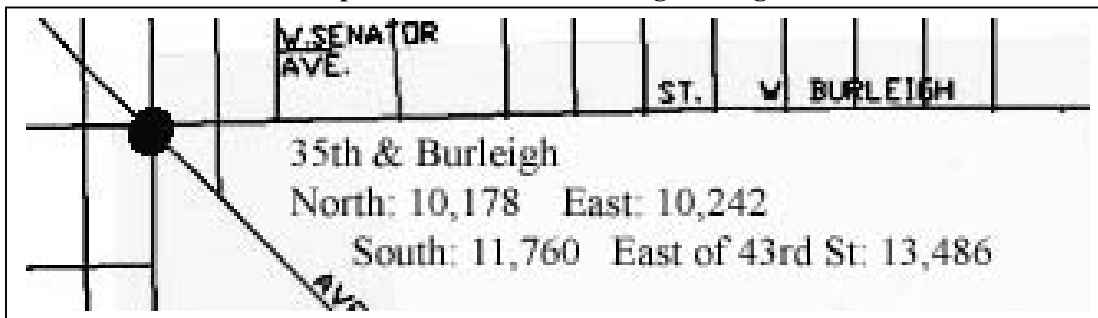
Fond du Lac Avenue had the most traffic, with approximately 26,000 to 27,000 vehicles measured each day at the intersections of Fond du Lac Avenue and Center Street. The busiest intersections are 35th Street and North Avenue, 35th Street and Center Street, Lisbon and 27th Street, and 27th Street and Center Street.

As a comparison, traffic counts along Capitol Drive near 60th Street, Midtown, the former site of Capitol Court, range between 30,000 and 35,000 cars. Approximately 20,000 cars travel along 60th Street in that same location. Wisconsin Avenue, near the Grand Avenue Mall, has traffic counts of approximately 14,000 cars.

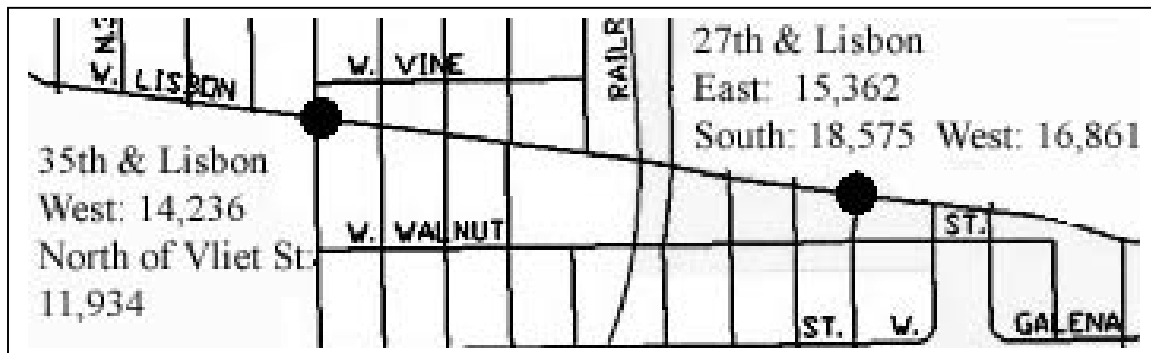
Map 8. Traffic Counts Along North Avenue



Map 9. Traffic Counts Along Burleigh Street



Map 10. Traffic Counts Along Lisbon Avenue



4. Housing Market Analysis

Examination of housing data shows that this neighborhood contains some of the oldest housing stock in Milwaukee, has low rates of owner occupancy, and has – relative to the City – very low assessed values. The inventory of housing is declining at a rapid pace as many of the older units are demolished.

Often, these factors would paint a picture of continued decline, and in areas where nothing is done, we can expect values and rental rates to decline relative to the City as a whole. There are, however, noticeable and strong signs of revitalization in the housing market. Areas where existing land was assembled to make way for new housing provides evidence that a strong market exists for market-rate housing.

Candidate areas were identified for continuation of successful new housing development similar to City Homes and Lindsay Heights. Areas recommended due to their capacity for land assembly include the area bounded by North Avenue, Vine Street, 20th Street and 17th Street. The blocks west of 20th Street and south of North Avenue are also recommended for new housing development in order to continue the success of new housing in City Homes, Lindsay Heights and the initiatives proposed near 20th and Vine Streets.

4.1 Market Characteristics

Inventory

The Fond du Lac and North Neighborhood contained 16,812 housing units in 2000. Approximately 28.6%, 4,818, were single-family units and 68.5 %, 11,528, were duplex units. Table 24 shows the number of single-family and duplex housing units within the neighborhood and the City of Milwaukee. Between 1990 and 2000, more housing units were demolished in the neighborhood than were added. The 1990 U.S. Census estimated there were 19,829 housing units in the area. By 2000, there were 16,812 housing units, a net decrease of 17%. For comparison, the City of Milwaukee had 254,204 housing units in 1990 and 249,225 in 2000. This is a net decrease of 1.1% throughout the City. Tables 25 and 26 demonstrate the change in single-family, duplex and multi-family housing in the neighborhood and the City of Milwaukee from 1990-2000. The neighborhood contributed 6.5% of total units of housing added in the City of Milwaukee from 1990-2000, but also accounts for 47.9% of the City's demolished units during that same period. This loss of housing units indicates that the housing demand is not sufficient to provide a return to the property owner for continued upkeep and maintenance of the property.

Table 24. 2000 Housing Units

2000 Housing Units	Fond du Lac &	City of
	North Neighborhood	Milwaukee
Single-Family	4,818	94,821
Duplex	11,528	72,070
Total	16,812	249,225

Table 25. 1990-2000 Change in Neighborhood Housing Units

Fond du Lac & North	Units Added	Units Demolished	Net Change
Single-Family	133	849	-716
Duplex	68	2,327	-2,259
Multi-Family	144	664	-520
Total	345	3,840	-3,495

Table 26. 1990-2000 Change in Milwaukee Housing Units

City of Milwaukee	Units Added	Units Demolished	Net Change
Single-Family	803	1,843	-1,040
Duplex	336	3,728	-3,392
Multi-Family	4,149	2,443	1,706
Total	5,288	8,014	-2,726

Source: Department of City Development

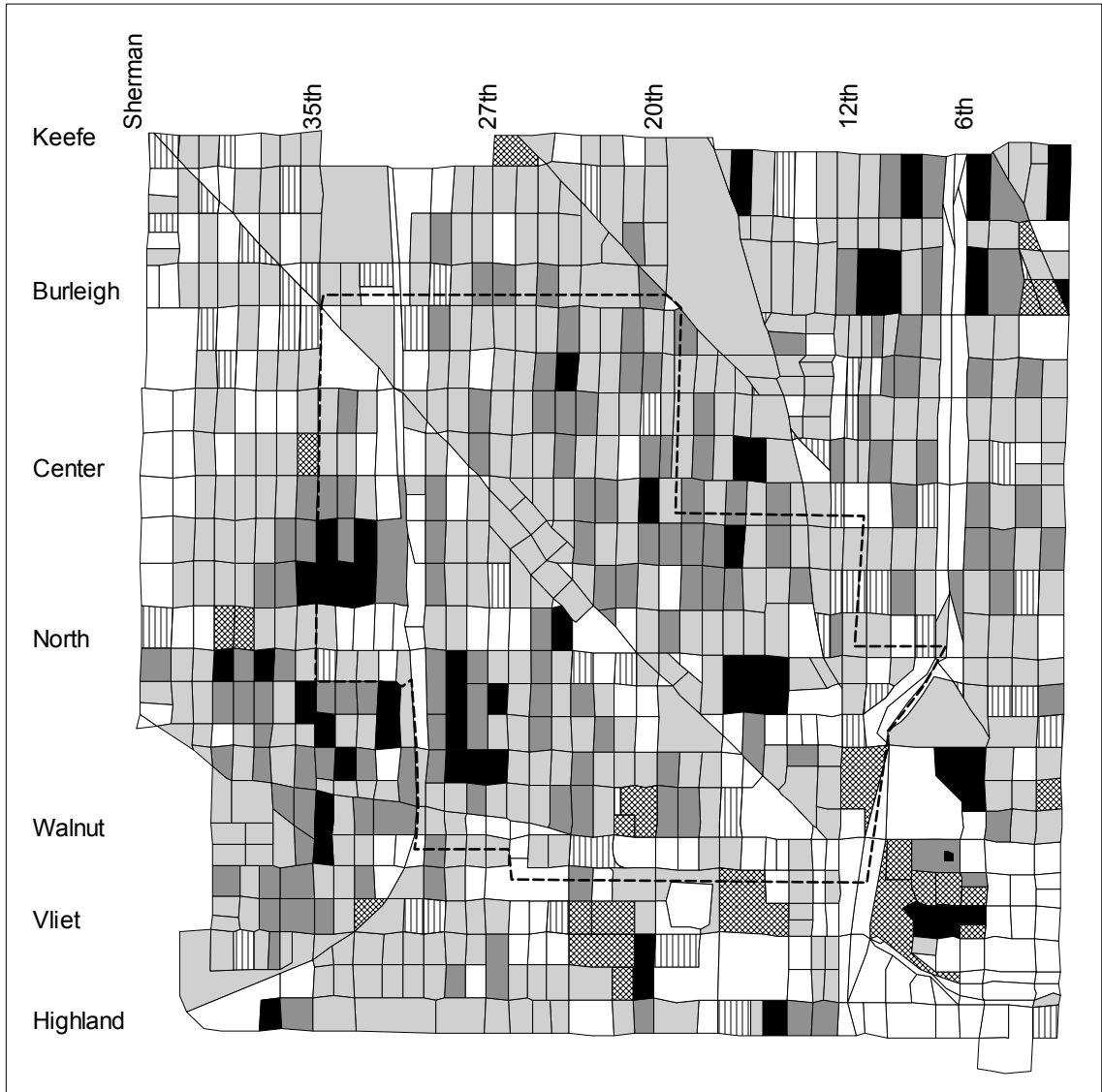
Map 13 shows that most of the clearance of housing units occurred east of 24th Street. There was significant clearance between North Avenue and Center Streets and between 20th Street and 15th Street.

New Housing Construction

Construction of new housing in this neighborhood was significant during the 1990s. Between 1990 and 1999, the City of Milwaukee initiated two new housing projects. The City Homes project built 77 units and Lindsay Heights project built 59 units. These homes offer features and room sizes found typically in mid-market-price homes being built throughout the Milwaukee area. The total price for a home and lot within the neighborhood is much less than comparable suburban homes because the land is provided at a very modest cost. The homes in Lindsay Heights and City Homes are priced at market values with a modest subsidy or incentives to attract owners.

Habitat for Humanity built and rehabilitated 199 homes in the area as well. Their units tend to be smaller and affordably priced. These opportunities, rather than the existing houses, may have appealed more to residents looking to buy a first home. Other housing initiatives in the neighborhood are included in Table 27.

Map 13. Change in Housing Units



Change in the Number of Housing Units: 1990 to 2000
 Area Change - 2,121 -- Source: 1990, 2000 Census

- loss 20 to 134
- loss 10 to 19
- loss 1 to 10
- ▨ increase 1 to 9
- ▨ increase 10 to 218
- no change

Table 27. Housing Initiatives Within the Neighborhood

Housing Projects	# of Units
City Homes	77
Lindsay Heights	59
Beauchamp Townhouses	26
Habitat for Humanity	199
Ezekiel	6
HACM Replacement	22

Source: Dept of Neighborhood Services

Price-Age-Size of Homes

The Fond du Lac and North neighborhood has an older housing stock than other areas of the City and surrounding suburbs. Table 27 provides a comparison of housing stock by price, age and size.

Despite its potential limitations, we believe the information in Table 28 presents a reasonable comparison of this neighborhood to others. The data in Table 28 shows that housing in the neighborhood is generally older, and of lesser value than the housing in the comparison areas. The size of units compares favorably.

Table 28. Comparison of Housing Stock

	Fond/North	City of Milw	West Allis	Wauwatosa
Median Value	\$38,500	\$80,400	\$99,200	\$138,600
Median Age of Home (Yrs)	59	49	50	48
Average Size (Sq/Ft)	1,272	1,344	1,189	1,253

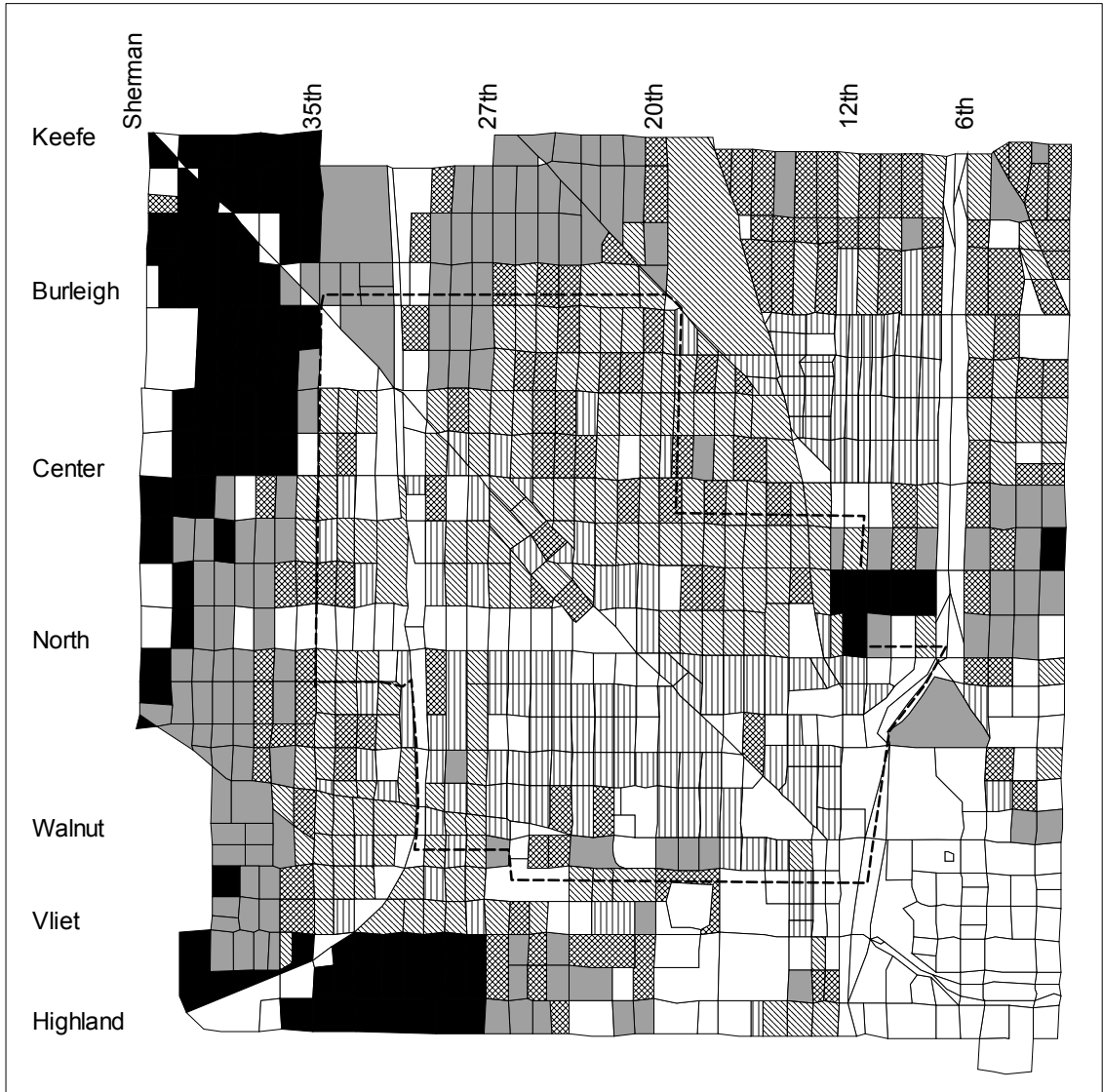
Source: 2000 Census and Shorwest Real Estate

Value

Assessment data by Census tract for single-family and duplexes was obtained from the City of Milwaukee for the Fond du Lac and North Neighborhood. This analysis was done to learn if noticeable sub-markets for housing exist within the neighborhood and to determine if multi-pronged strategies for housing should be considered. Areas with low values (less than \$20,000), low ownership rates (less than 40%), high vacancy rates (more than 12.5%) and areas with more than 10 vacant lots may be good candidates for land assembly and redevelopment. On the other hand, areas with higher values and fewer vacant lots may be good candidates for housing conservation efforts.

Maps 14 and 15 show the average assessed value of duplex parcels within the neighborhood from 1990 and 2001. Duplex values are declining which indicates a drop in the rental market. Overall values, while increasing, are falling behind the City average. In 1990, the average assessed value for a duplex was \$19,323, or 40% of the City average of \$47,518. In 2001, the average assessed value was \$22,814, or 30% of

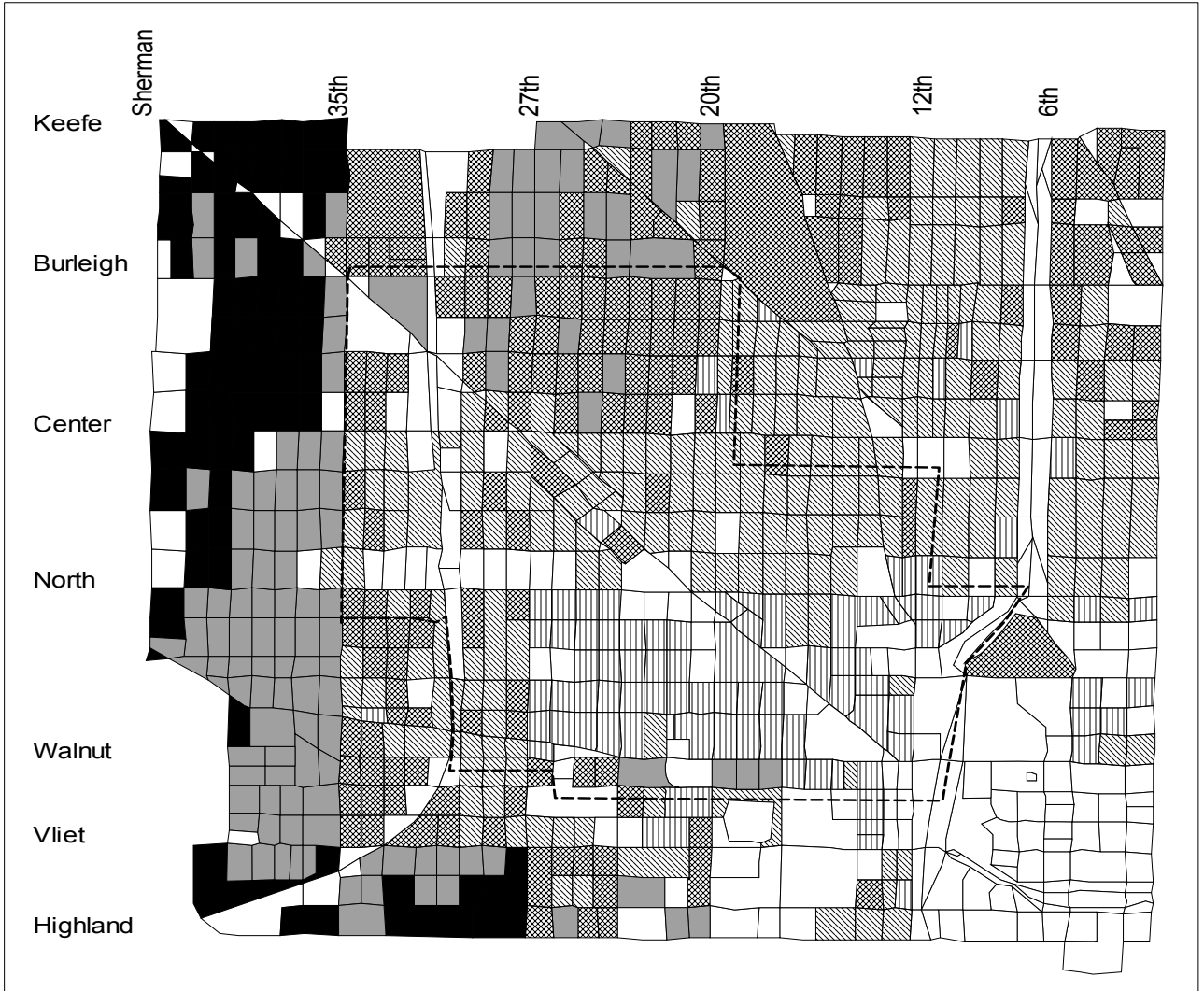
Map 14. 2001 Average Assessed Value for Duplex Parcels



Average Assessed Value, Duplex Parcels, 2001
 Area Average = \$22,814, City Average = \$72,283 - Source: MPROP

- Less than \$20,000
- ▨ \$20,000 to \$24,999
- ▩ \$25,000 to \$29,999
- \$30,000 to \$39,999
- \$40,000 to \$92,700
- no duplex

Map 15. 1990 Average Assessed Value for Duplex Parcels



Average Assessed Value, Duplex Parcels, 1990
 Area Average = \$19,323, City Average = \$47,518 - Source: MPROP

- less than \$15,000
- ▨ \$15,000 to \$19,999
- ▩ \$20,000 to \$24,999
- \$25,000 to \$34,999
- \$35,000 to \$71,400
- no duplex

the City average of \$72,283. Decreasing values can create disinvestments. Low rents often cause low values. Low values and low rents provide owners with limited ability to properly maintain and conserve their properties. This, in turn, leads to further deterioration of the physical condition of the property and an increase in blight. The primary area of concern is the area south of North Avenue.

Maps 16 and 17 show the average assessed value of single-family homes in the neighborhood from 1990 to 2001. The areas south of North Avenue have the lowest values. The area west of 30th Street to north of Burleigh are stronger although are still very low relative to the City. The lowest values are clustered around Fond du Lac and North Avenue, 20th to 27th Streets and Walnut to Center Street. The pockets of single-family homes with higher assessed values are due to City Homes.

Map 18 shows the assessment values for all housing units within the neighborhood. This map clearly shows the differences in assessed values in the neighborhood. The majority of the neighborhood has low assessment values, less than \$20,000. The areas with moderate to high assessment values, between \$50,000 to \$100,000, are located in Lindsay Heights and City Homes. Neighborhoods west of the study area have higher assessment values. The northwestern corner of the neighborhood has a greater mix of assessment values, with values ranging from less than \$20,000 to \$50,000. As you move south through the neighborhood, the number of housing units valued at less than \$20,000 increases.

Map 19 shows the distribution of housing within the Fond du Lac and North neighborhood by comparing the percentage of single-family houses and duplexes within the neighborhood by Census tract to the percentage of single-family houses and duplexes within the City of Milwaukee. Tables showing distribution of single-family houses and duplexes by Census block group are located in Appendix 2. The neighborhood is predominantly single-family and duplex homes with very few multi-family housing. There are a large number of vacant parcels (shown in black) south of North Avenue.

Owner Occupancy

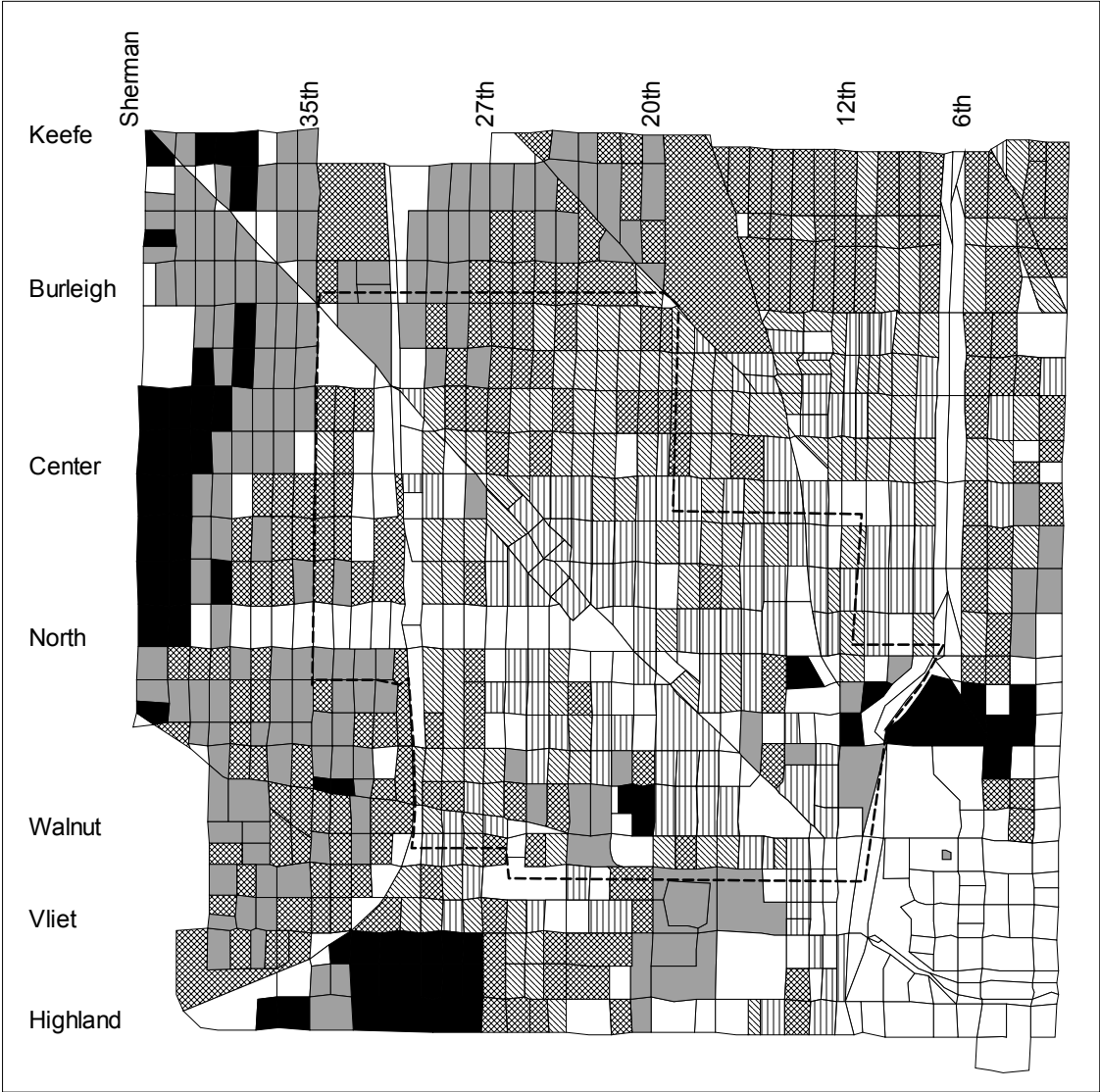
Table 29 shows the percentage of owner and renter occupied households within the neighborhood. 69% of the households in the neighborhood are renter occupied compared to a City average of 55%.

Table 29. Households within the Neighborhood

	1 Mile Radius	3 Mile Radius	5 Mile Radius
Total Households	8,988	98,584	196,259
% Owner Occupied	30.9%	32.1%	43.9%
% Renter Occupied	69.1%	67.9%	56.1%

Source: 2000 U.S. Census

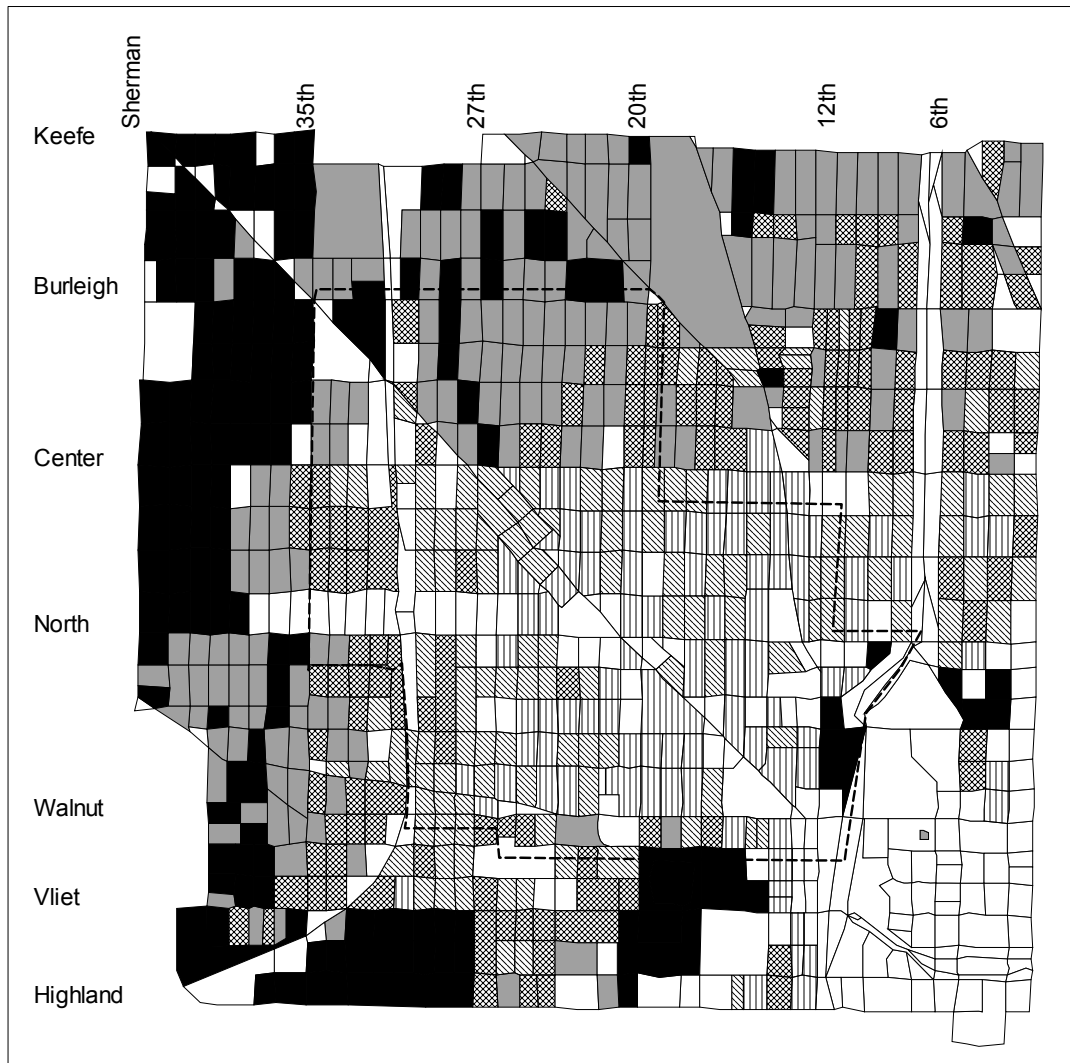
Map 16. 2001 Average Assessed Value for Single-Family Parcels



Average Assessed Value, Single Family Parcels, 2001
 Area Average = \$21,850, City Average = \$79,236 - Source: MPROP

- less than \$15,000
- ▨ \$15,000 to \$19,999
- ▩ \$20,000 to \$29,999
- \$30,000 to \$49,999
- \$50,000 to \$153,200
- no single family

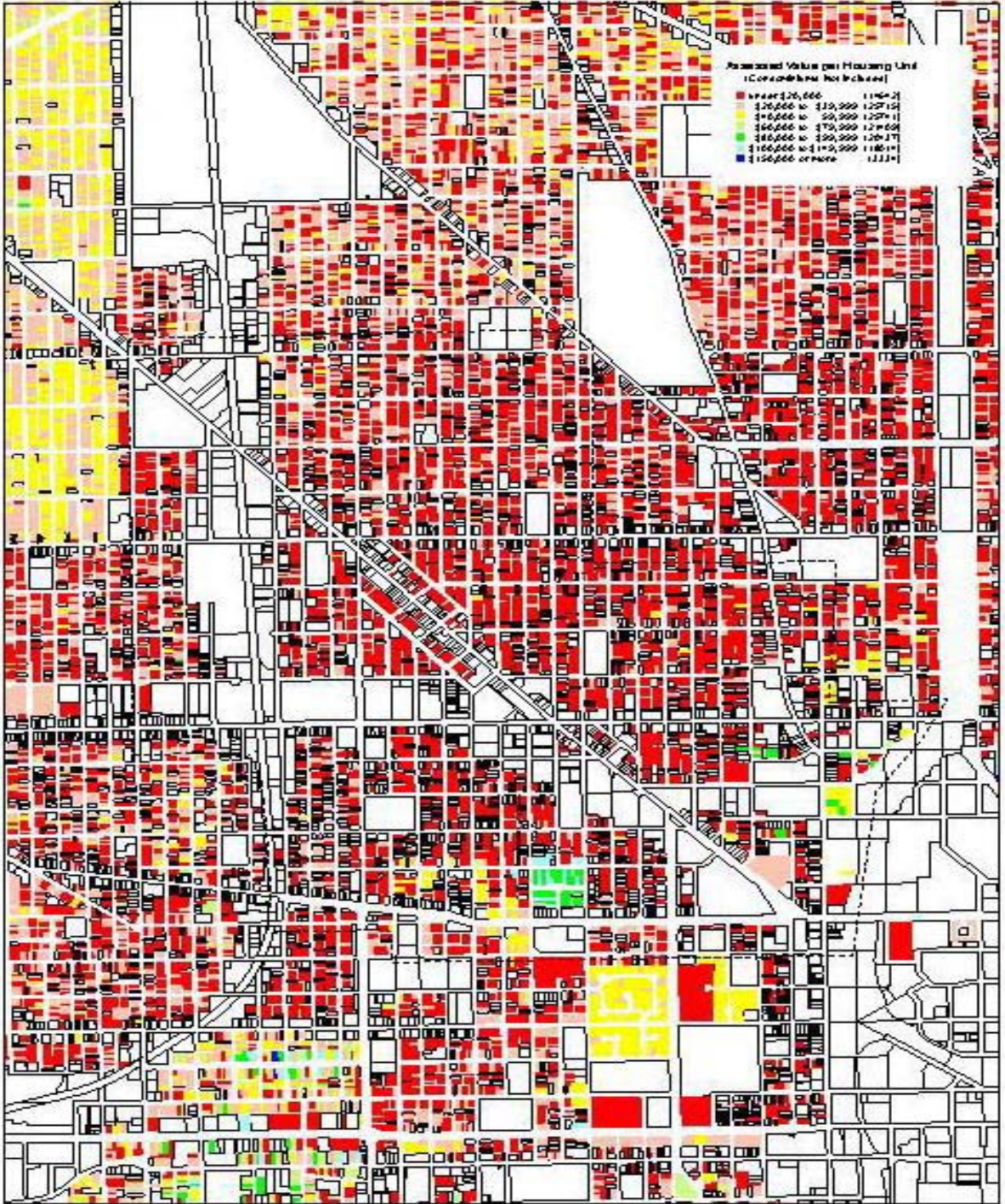
Map 17. 1990 Average Assessed Value for Single-Family Parcels



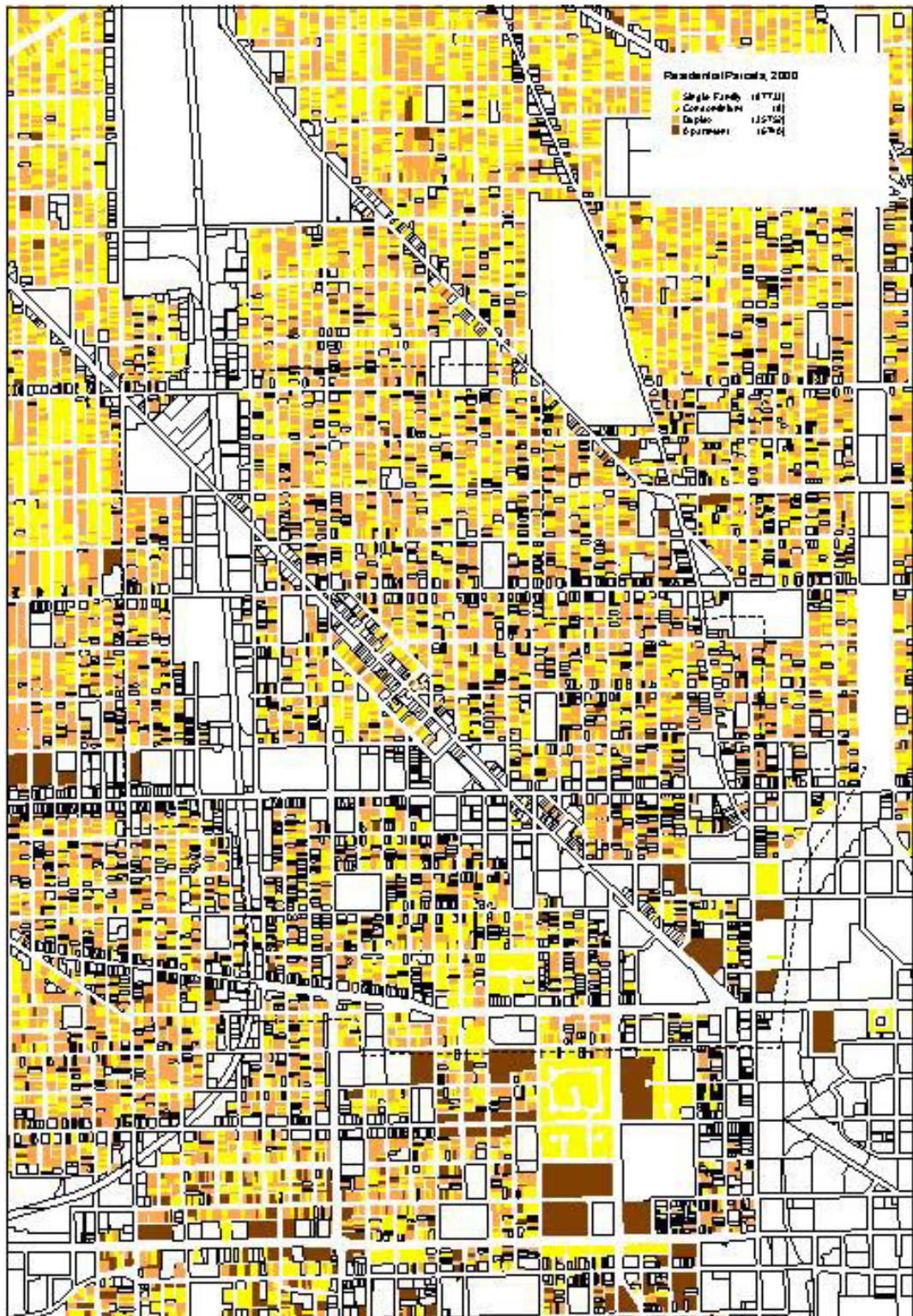
Average Assessed Value, Single Family Parcels, 1990
 Area Average = \$15,035, City Average = \$57,375 - Source: MPROP

- ▤ less than \$10,000
- ▥ \$10,000 to \$14,999
- ▧ \$15,000 to \$19,999
- ▨ \$20,000 to \$24,999
- \$25,000 to \$68,400
- no single family

Map 18. Assessed Values per Housing Units



Map 19. Residential Parcels Within the Neighborhood



Owner occupancy is, however, increasing in the neighborhood. In 1990, 25.1% of the households were owner occupied within the neighborhood. By 1999, owner occupancy had increased by approximately 5% to 30% of all parcels being owner occupied. For comparison, the City of West Allis had an owner occupancy rate of 59.4% and the City of Wauwatosa had a 68.7% owner occupancy rate in 1990. Owner occupancy in the neighborhood is increasing as a result of the housing initiatives, such as City Homes and Lindsay Heights. In 1990, there were 4,972 owner occupied housing units in the neighborhood. By 2000, there were 5,363 owner occupied housing units. The increase of 391 owner occupied units is a reflection of the 398 housing units developed and renovated by various housing initiatives.

Map 20 and Map 21 show the changes in owner occupancy within the neighborhood. Most of the owner occupancy is north of Center Street and west of 30th Street. In general, the area south of North Avenue has low rates of owner occupancy, except for the City Homes, Lindsay Heights and Habitat for Humanity initiatives.

Vacancy

The Fond du Lac and North Neighborhood has a vacancy rate of 14.8%, almost 2.5 times the 6% City vacancy rate. The highest vacancy rates are around Fond du Lac and North Avenue, south of North Avenue to Galena, and some pockets between 29th and 25th Streets from Hadley to Burleigh.

Map 22 shows the percentage of vacant units throughout the neighborhood.

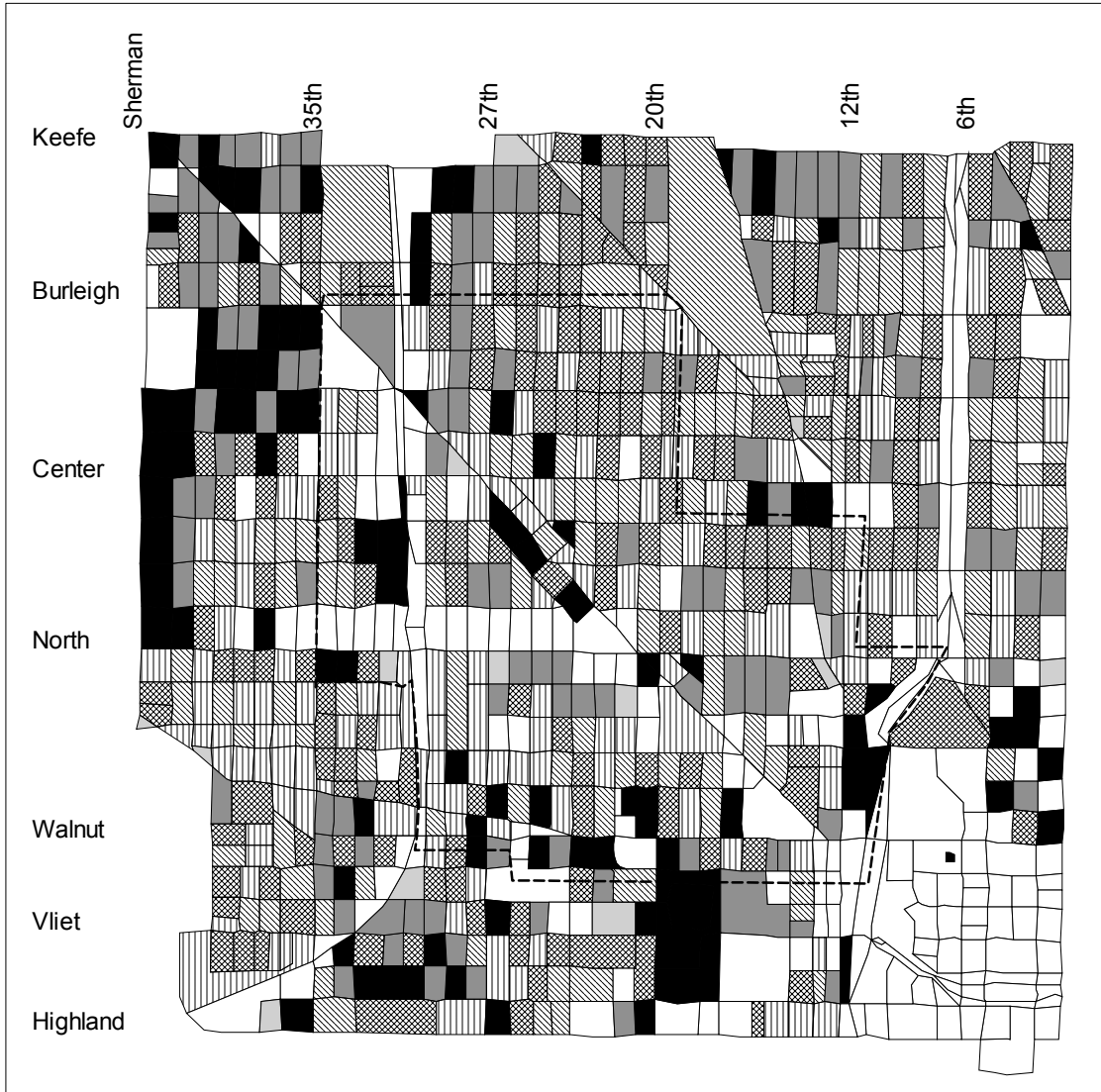
Vacant Lots-Foreclosed Properties

We are aware of a significant number of vacant lots and foreclosed properties in the neighborhood. (Foreclosed includes properties owned by RACM and HUD.) It is important to locate these parcels because they identify opportunities for possible redevelopment and they also identify potential areas of blight and negative influences on the neighborhood.

Identification of the vacant lots and foreclosed properties will provide two important pieces of information. If strong concentrations of vacant land and foreclosed properties are found, it may suggest opportunities for redevelopment initiatives like City Homes and Lindsay Heights. Locating these properties will also show where the greatest threats to existing housing occur and where a housing conservation strategy is most urgently needed.

Map 23 shows the location of vacant lots, foreclosed properties and a combination of both. The study boundaries of the Fond du Lac and North neighborhood are outlined on the map. Comparing the study area to the areas immediately outside the neighborhood shows the neighborhood has a larger number of vacant land and buildings, City/RACM owned properties and tax delinquent properties. As you move south through the neighborhood, the number of vacant lots and City owned property appears to increase.

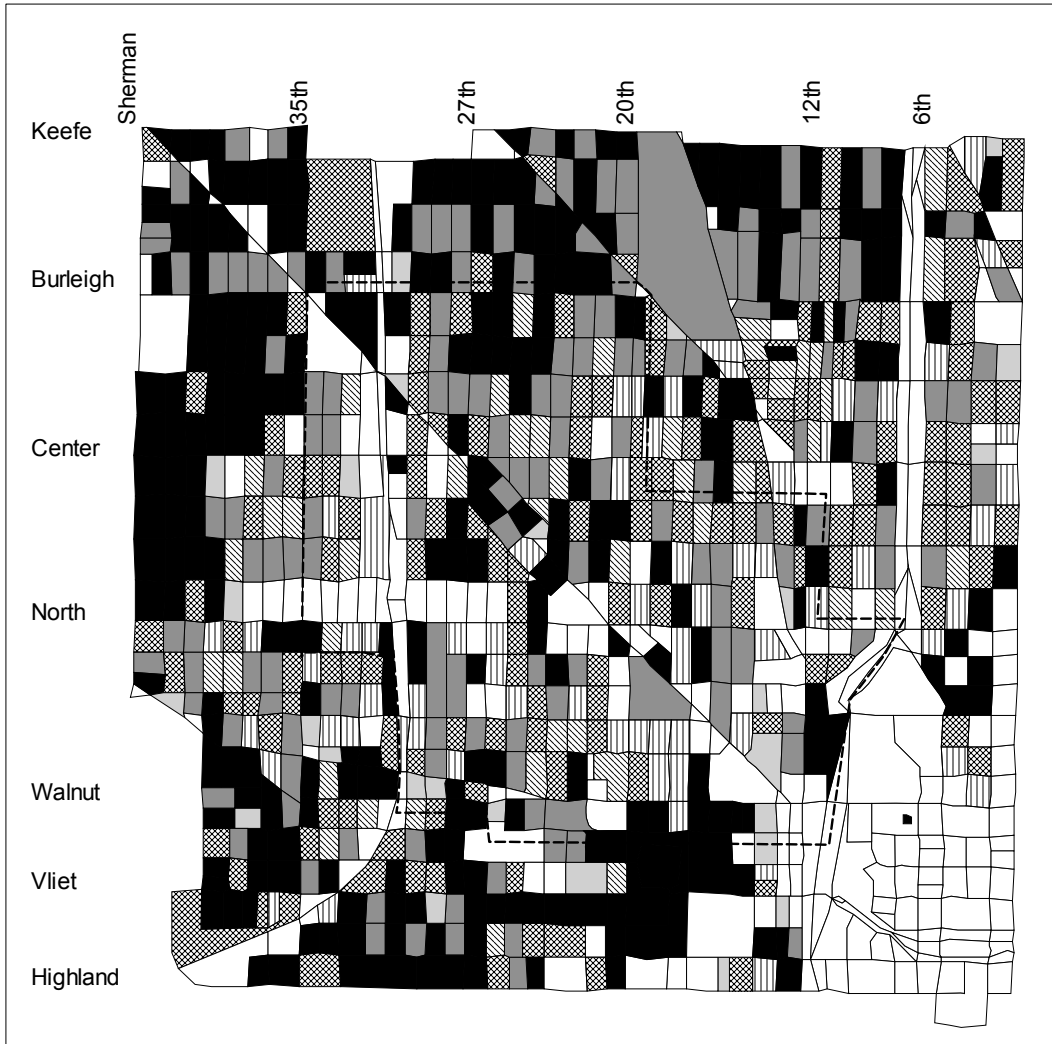
Map 20. 2001 Owner Occupancy for Single-Family and Duplex Parcels



Owner Occupancy Rate Single Family and Duplex Parcels 2001
 Area Average =49.3%, City Average = 79.2% Source: MPROP

- none
- ▤ less than 40.0%
- ▥ 40.0% to 49.9%
- ▧ 50.0% to 59.9%
- ▨ 60.0% to 74.9%
- 75.0% to 100.0%
- less than 5 single family or duplex parcels

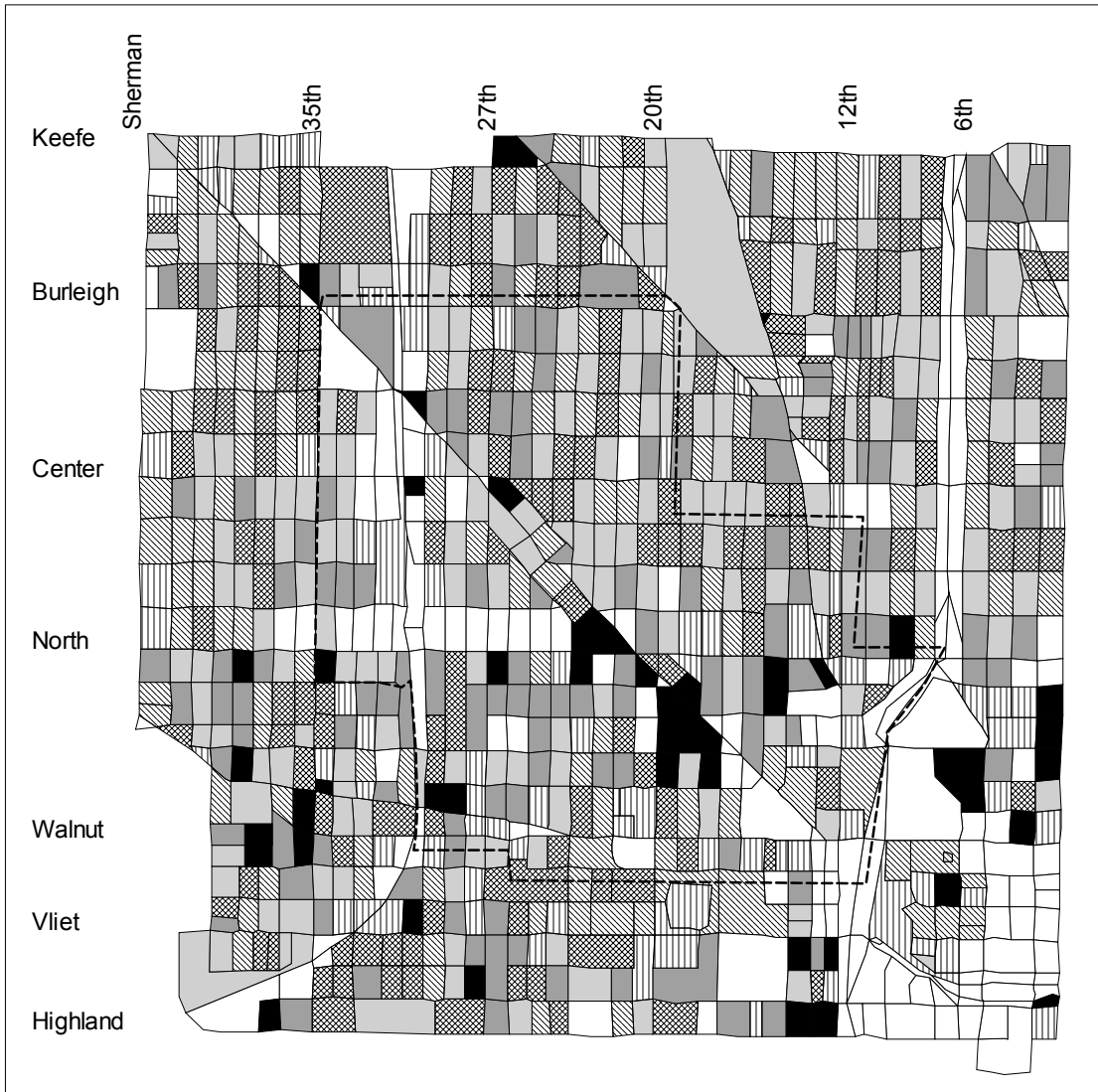
Map 21. 1990 Owner Occupancy for Single-Family and Duplex Parcels



Owner Occupancy Rate Single Family and Duplex Parcels 1990
 Area Average = 45.7%, City Average =79.5% Source: MPROP

- none
- ▤ less than 40.0%
- ▥ 40.0% to 49.9%
- ▧ 50.0% to 59.9%
- ▨ 60.0% to 74.9%
- 75.0% to 100.0%
- less than 5 single family or duplex parcels

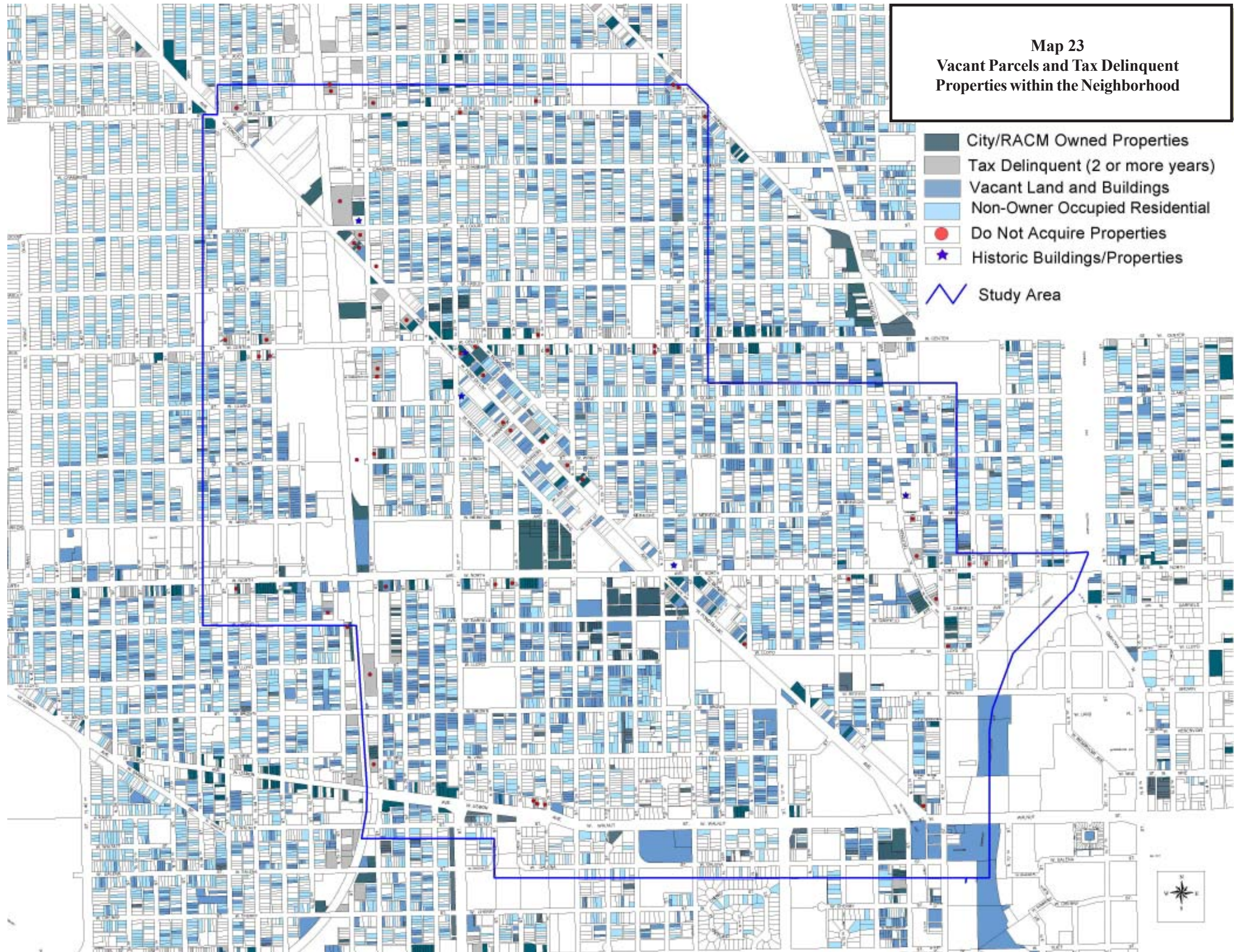
Map 22. Percent of Vacant Housing Units, 2000



Percent Housing Units Vacant, 2000 Area Average = 14.8%
 City Average = 6.0% -- Source: 2000 Census File SF1

- none
- ▨ less than 7.5%
- ▩ 7.5% to 12.4%
- ░ 12.5% to 19.9%
- ▒ 20.0% to 34.9%
- 35.0% to 100.0%
- no housing units in 2000

Map 23
Vacant Parcels and Tax Delinquent
Properties within the Neighborhood



The area north of Center Street shows small segments of vacant land or buildings. These parcels show where disinvestment has already occurred. A housing conservation strategy is needed in areas surrounding these vacant lots. The area south of North Avenue has a larger number of vacant parcels and vacant buildings which may offer opportunities for land assembly and new housing development for projects.

Mobility

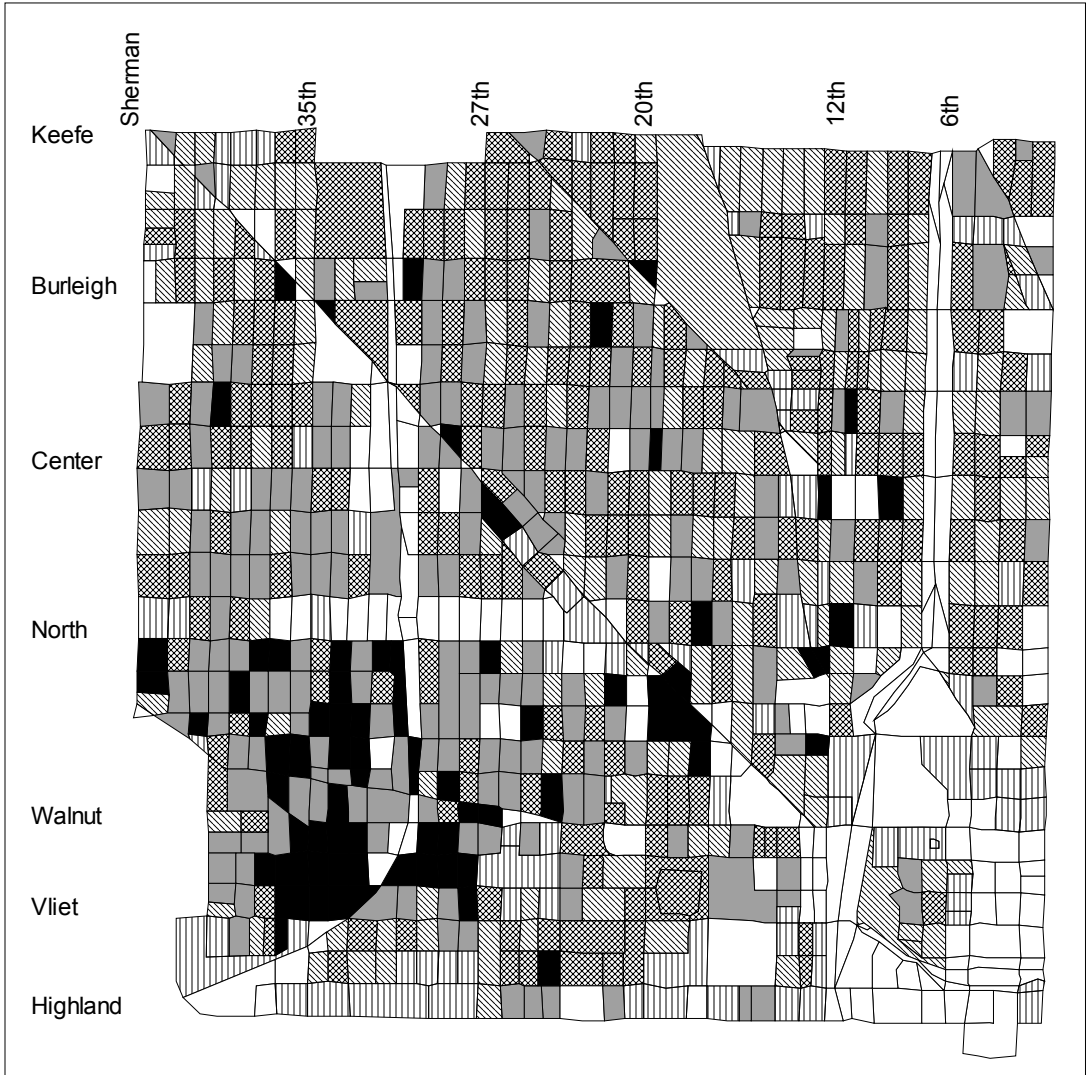
There is evidence of high mobility within the Fond du Lac and North neighborhood. Milwaukee Public Schools monitors the number of students that enter and leave schools between September and June. Student mobility ranged from 5% to 38% of all children in the schools within the neighborhood. Within the area of influence, student mobility ranges from 5% to 68% for elementary and middle schools. This indicates relatively short tenancy in rental properties and corresponding high turnover of units.

Within the neighborhood, 70% of the occupied housing units are renter-occupied. The indicators of high mobility among renters are a concern because of the high percentage of rental units in the neighborhood. Root causes of high mobility typically relate to poverty and other economic issues. There is little that can be done in a neighborhood plan to solve these problems. Instead, the plan must address this reality in any recommendation that is crafted.

Household Size

The average household size in the neighborhood is 3.35. The average household size for the City of Milwaukee is 2.5. Map 24 shows the average household size throughout the neighborhood. Looking at data regarding the percentage of households with children, on average, approximately 45% of the households in the area have children while 30.5% of the households throughout the City have children. Map 25 shows the percentage of households with children within the Fond du Lac and North Neighborhood. Neighborhood households are larger and more likely to have children than the City as a whole. The larger household size in the neighborhood may reflect the need to have more people to help pay the rent or mortgage and other bills. Household size may impact the desired features in future housing development, such as the number of bedrooms and bathrooms.

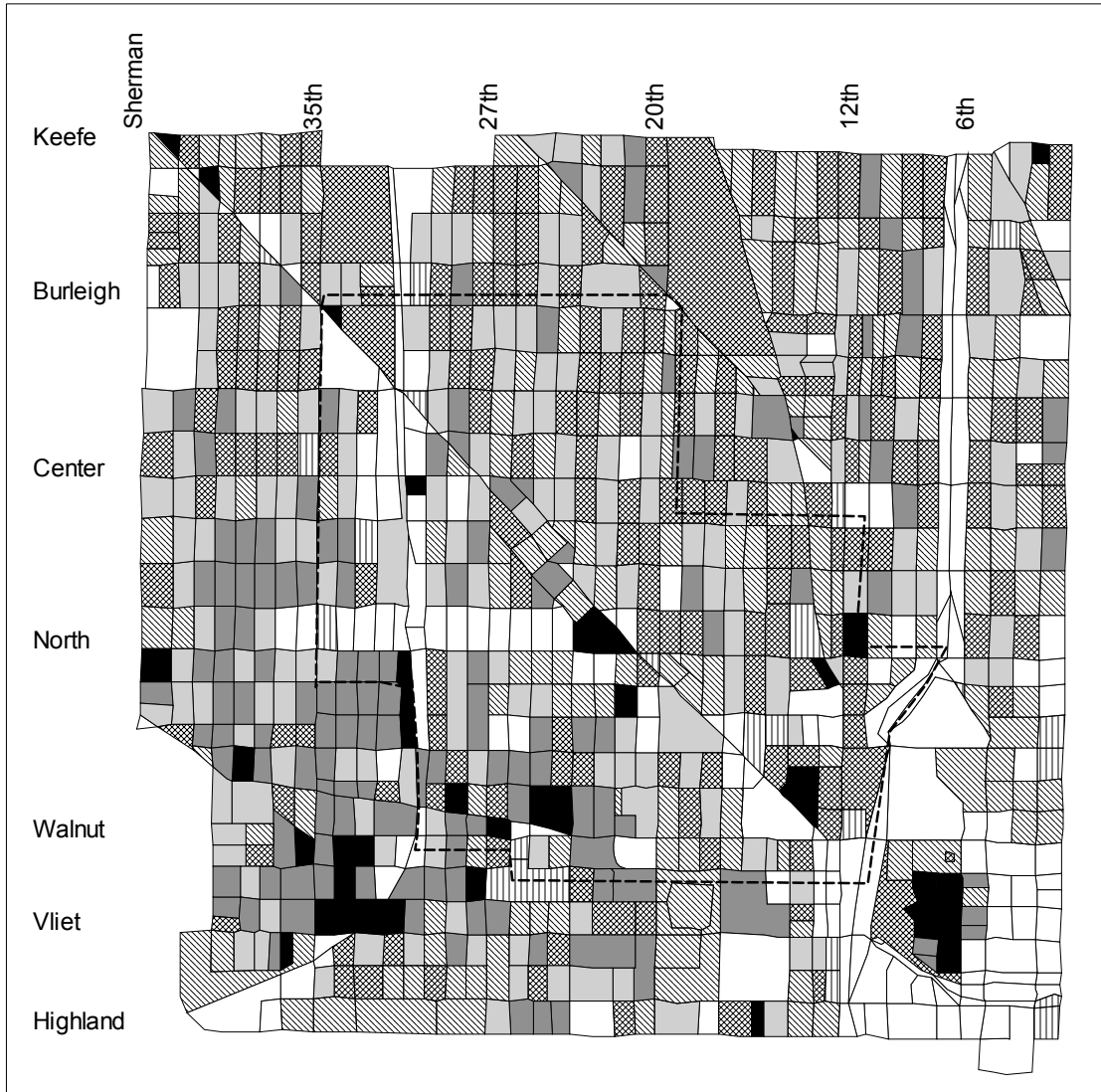
Map 24. Average Household Size, 2000



Average Household Size, 2000 Area Average = 3.35
 City Average = 2.50 -- Source: 2000 Census File SF1

- less than 2.50 persons
- ▨ 2.50 to 2.99
- ▩ 3.00 to 3.50
- 3.50 to 4.25
- 4.25 to 9.00
- no households

Map 25. Percent of Households with Children, 2000



Percent Households w ith Children, 2000 Area Average = 44.7%
 City Average = 30.5% Source: 2000 Census File SF1

- none
- ▨ less than 35.0%
- ▩ 35.0% to 44.9%
- ▧ 45.0% to 54.9%
- ▦ 55.0% to 74.9%
- 75.0% to 100.0%
- no households

Senior Housing

The Fond du Lac and North neighborhood has 145 senior housing units. Additional senior housing is available within the area of influence and is provided by the Housing Authority of the City of Milwaukee (HACM). Table 30 and 31 lists the senior housing facilities and number of units within the neighborhood and area of influence.

Table 30. Senior Housing Facilities Within the Neighborhood

Apartment/Owner	Address	# of Units
Parc West Apartments	2342 N. 35th Street	35
WAICO Apartments	1726 N. 12th Street	40
WAICO Apartments	1919 N. 11th Street	20
St. Mark AME	2025 N. 14th Street	50

Source: HACM

Table 31. Senior Housing Facilities Within the Area of Influence

Name	Address	# of Units
Lapham Park	1901 N. 6th Street	200

Nursing Care

The neighborhood currently has one nursing care facility, however this facility will be closing as a result of higher costs of patient care and insufficient reimbursement rates from Medicaid. Additional nursing care facilities are available in the area of influence.

A “nursing home or care facility” is defined as a facility that provides full-time nursing care for their residents. Table 32 and 33 list the nursing care facilities within the neighborhood and the area of influence.

Table 32. Nursing Care Within the Neighborhood

Name	Address	# of Beds
St. Mary's Nursing Home	3510 W. Center Street	97

Table 33. Nursing Care Within the Area of Influence

Name	Address	# of Units
Jackson Center Nursing Home	1840 N. 6th Street	126
Kilbourn Care-Beverly Health	2125 W. Kilbourn Avenue	102

The neighborhood has 15.1% of the population over the age of 55 within a 3-mile radius of Fond du Lac and North compared to the 20.1% of the population in the City of Milwaukee. The current supply of senior housing and nursing care facilities within the neighborhood and area of influence is sufficient to meet the needs and demands of the community. According to the Housing Authority of the City of Milwaukee, there is an oversupply of subsidized elderly housing throughout the city. Some senior housing facilities have almost no wait list and are actively recruiting to fill vacancies.

Multi-Family Housing

Duplex units characterize the rental market in the neighborhood. A relatively small percentage of total housing units are multi-family. Table 34 lists complexes with 7 or more units. The neighborhood also has 65 apartments with 4-6 units. Many communities dislike the presence of multifamily housing, however, multifamily housing fills a need in the residential market and does help maintain a mix of housing types. For example, someone moving out of their parents home, but wanting to stay in the area should have the option of moving into an apartment and not having to rent a duplex, purchase a home, etc. Multifamily units provide, in many cases, lower cost/rent and less maintenance than a house.

Table 34. Multi-Family Apartments Within the Neighborhood

Apartment/Owner	Address	# of Units
B & B Investments	2453 N. 17th Street	12
Clay Stephens	2702-2714 N. 26th Street	11
David Nowak	1955 N. 29th Street	8
Chris Ikanih	2126-2132 N. 16th Street	8
D & B Properties	2776 N. 35th Street	8
WAICO Apartments	1107 W. Reservoir Ave	45
WAICO Apartments	1823 N. 13th Street	22
WAICO Apartments	1360 W. Fond du Lac	36
Walnut Park Apartments	1551 N. 9th Street	149
London Square Apartments	2035 W. Galena Street	189

Source: City of Milwaukee GIS Database

4.2 Sector Assets

The neighborhood has many assets. The neighborhood is close to downtown Milwaukee, so residents are only a few miles from downtown businesses and entertainment. The area is well served by public transportation and has access to major freeways, such as I-94 and I-43.

New housing in the neighborhood has seen a strong market response and property values are holding well. According to the City of Milwaukee's Department of Neighborhood Services, 700 people have expressed an interest in purchasing a home through housing initiatives such as City Homes and Lindsay Heights. The 2002 assessments show that the

average assessed value for the Census tract containing City Homes is approximately \$50,000. The neighboring Census tracts have average assessed values between \$12,000 and \$20,000. This is a strong indication that well-designed units, with market features and located in “sub-neighborhoods” are in demand and will continue to sell.

Much of the remaining housing stock is in decent, safe and sanitary condition considering that it is some of the oldest housing stock in the City. However, the proliferation of vacant lots and foreclosures present a threat to the existing stock. The demolition of the worst units has occurred and new market-rate units are on the market. The neighborhood is seeing evidence of market strength in new housing.

4.3 Sector Weaknesses

Homes in the Fond du Lac and North neighborhood are older than homes in the City of Milwaukee. An older housing stock may have traditional characteristics, such as hardwood floors and wood trim, but typically requires more maintenance. In addition to the higher maintenance costs the older homes do not offer many features found in newer houses (storage closets, room sizes, electrical services). A drive through the neighborhood shows many homes that are boarded up and in poor condition indicating market rents in the neighborhood are probably not sufficient to adequately fund major maintenance and repair needs.

Discussions with persons familiar with the housing stock indicate that much of the existing housing stock does not have the amenities or features currently demanded by the market, hence the lower than average prices and rents. The existing housing stock has smaller rooms, they usually have only one bathroom, the furnaces are older and the closets are small, if there are closets. New construction in the neighborhood has been developed at market rates and assessed values are above \$105,000.

Low income and ability to afford higher rents goes hand-in-hand with low values and relatively poor conditions. Efforts to improve the existing housing stock will be seriously limited until incomes in the neighborhood increase.

Housing developers indicated strong reservations about developing market rate multi-family housing in the neighborhood. Their concerns were primarily about maintaining economic value of the properties. One developer told us that incentives of free land would still not overcome the gap in costs to build multi-family housing when compared to the market value of the housing upon completion. We were told that deep subsidies would be needed to make any market rate housing work for a developer.

Other concerns raised by the housing developers with whom we spoke with involved the perceived notions of high crime and drug trafficking in the neighborhood. They felt that any new multi-family housing, no matter how well the management screened the prospective tenants, would still have one or two tenants engaged in illegal activities. If this happens, the project will lose quiet and reliable tenants and decline in value.

Those developers also indicated that more productive use of resources in promotion of home ownership would help stabilize the neighborhood and increase its desirability.

4.4 Market Dynamics

Average assessed values for single-family homes and duplexes are considerably below City averages but have increased within the Fond du Lac and North neighborhood over the past 10 years. Between 1990 and 2001, average assessed values for single-family homes in the neighborhood increased by 31% from \$15,035 to \$21,850. Assessed values for duplexes increased by 15% from \$19,323 to \$22,814. The City of Milwaukee saw a 38% increase in the average assessed value of single-family homes and a 52% increase in the average assessed value of duplexes.

The neighborhood has experienced reinvestment and new construction in its housing stock. The oldest and most obsolete units are being removed to eliminate a blighting influence. Their removal follows the significant decline in neighborhood population. The decrease in the number of housing units does not necessarily represent disinvestments in the neighborhood. During the ten-year period between 1990 and 2000, the Fond du Lac and North neighborhood experienced a loss of 17,944 people in its population. The entire City of Milwaukee experienced a loss of 31,114 people in its population during the same period. As population declines, surplus housing stock can be eliminated. The housing stock that is eliminated typically represents the oldest, least appealing units, those that have code violations or those in need of major repairs. The elimination of the poor housing stock in an area creates opportunities for new infill housing development, which is evident in the neighborhood with numerous increases in new housing stock.

The Lindsay Heights and City Homes projects have brought new home construction into the neighborhood. The Lindsay Heights housing development started in 1995 and enabled homeowners to purchase a new home with the low cost mortgages provided by the Wisconsin Housing and Economic Development Authority (WHEDA). The Lindsay Heights neighborhood receives money from the City of Milwaukee through the creation of a tax increment district. The money is not only used to assist in the construction of new homes in the area but also to enable other homeowners to rehab or renovate existing homes in the neighborhood.

The City Homes housing development used a modest subsidy provided by the City of Milwaukee for the construction of new homes. Homebuyers purchased a lot with an understanding that they would complete the construction process for a new home. Low interest rate loans were available to homebuyers in the City Homes. The City of Milwaukee's Department of Neighborhood Services (DNS) has indicated that approximately 700 people have expressed an interest in buying homes in the neighborhood through such projects as City Homes and Lindsay Heights. This is a significant indicator of demand. If land was made available for clustered housing development, the lots would be absorbed by the market.

Habitat for Humanity has been very active in the Fond du Lac and North neighborhood, primarily in the areas south of North Avenue and west of 24th Street. Habitat for

Humanity constructs smaller homes than those in Lindsay Heights or City Homes, which creates a mix of housing types available in the neighborhood. Habitat for Humanity will move their efforts to other neighborhoods within the City of Milwaukee in order to maintain a mix of housing types within the Fond du Lac and North neighborhood and avoid an over concentration of small homes in the neighborhood.

One interesting characteristic observed in the City Homes and Lindsay Heights project is the divergence of “market” values in the new homes versus existing homes. These homes have significantly higher values than the older homes. While overall market values for homes in the neighborhood are quite low, assessed values for new homes in these projects is above \$100,000: more than double the average home value. Another characteristic of these projects is that many of the new home buyers, based on a means-test basis, “did not need” the small subsidy or incentive that was offered to attract buyers to the neighborhood. This is also positive for the neighborhood because it illustrates an increase in economic diversity in the neighborhood.

This bifurcated housing market, in which the older existing homes are valued at less than one-third the value of new homes, indicates the neighborhood itself is appealing to many persons that can afford to pay for a modern home with all the modern features. The existing housing stock is constraining the demand for housing and subsequent value of housing. Opportunities for new development or possible housing renovation to modern standards would likely be rewarded by purchasers willing to pay market prices. Existence of this demand was seen in the 700 plus person “waiting list” for new City Homes.

The success of City Homes and Lindsay Heights demonstrates that there is a market for middle, or market rate, housing units in this neighborhood. Expressions of interest to the Department of Neighborhood Housing Services indicates continuing demand that has not been fulfilled, thereby reinforcing evidence that values should be sustained. Although City Homes is financially supported by the City of Milwaukee, the values of the homes are increasing towards normal market values. As the neighborhood develops, the effects of the market may eliminate the need for housing subsidies.

The strategic location of housing throughout the neighborhood can increase housing demand and attract people to the community. We believe the success of Lindsay Heights and City Homes is not only the appeal of new construction, but also the clustering of homes in a smaller neighborhood unto themselves. The cluster of homes and the sense of community that it creates will attract people that are moving into the area.

4.5 Market Opportunities

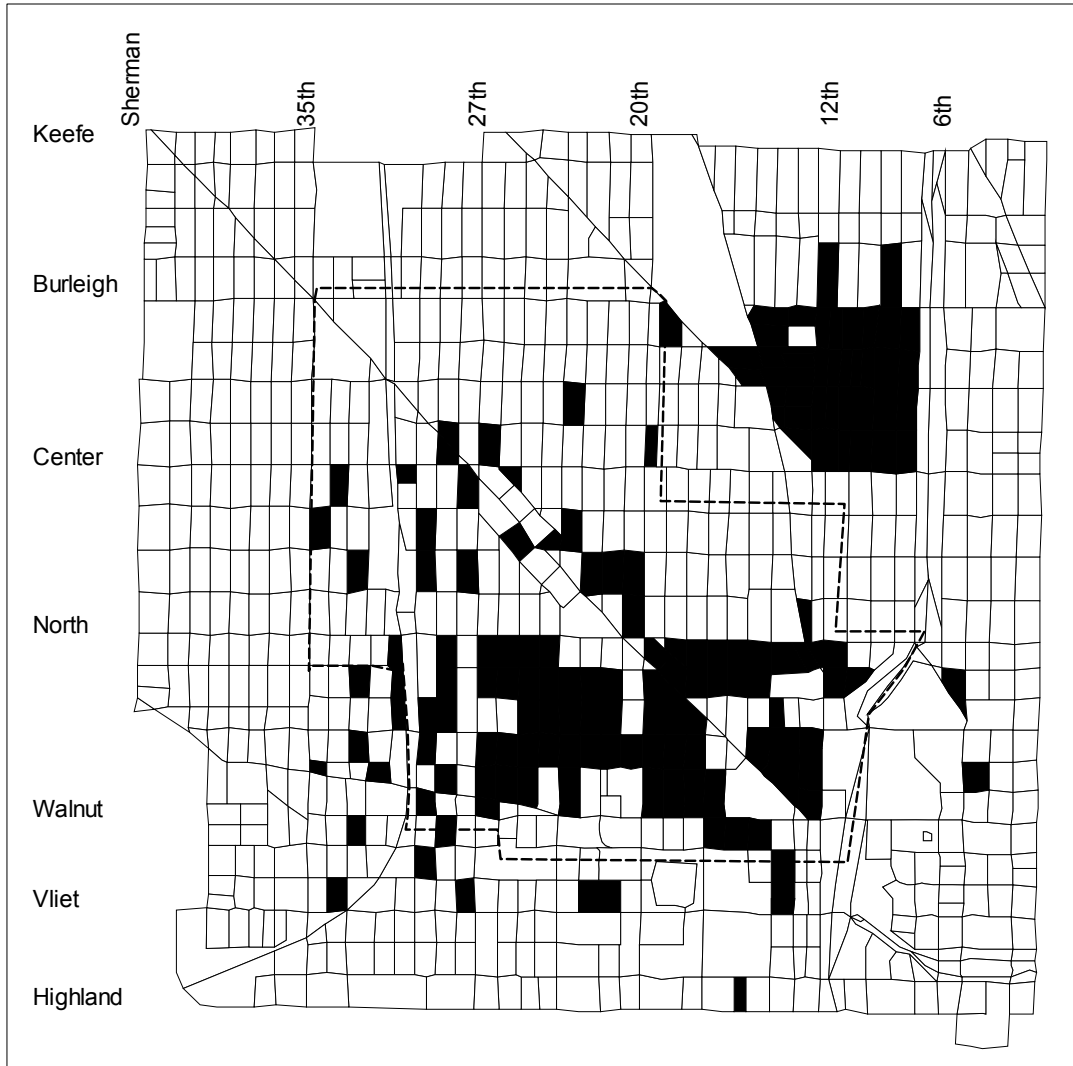
Despite the low incomes, we believe significant opportunities exist for the housing sector. Housing opportunities within the Fond du Lac and North neighborhood can be divided into areas for a housing rehabilitation and neighborhood conservation program and areas for new housing development. Conservation is cost-effective for providing relatively low-cost housing. New housing development is challenging because of the expense and the City's express desire to conserve existing housing wherever possible. However, with many vacant lots and relatively low home ownership, there is land for new housing. The success of City Homes and Lindsay Heights has demonstrated that a demand exists for market priced, new homes that offer modern features and conveniences.

Existing conditions were examined to identify areas where new housing development, similar to Lindsay Heights or City Homes, might make more sense, i.e.). clustered development of new market rate homes with modern features in areas where the existing conditions had failed the residential market.

Relative conditions that meet or exceed most of the following characteristics should be considered for land assembly and new home development because they show a housing market that has failed. Failure could be due to a number of factors such as too many blighting influences or lack of supply that meets market needs. Whatever the reason, new housing stock must be created in order to cost effectively reverse conditions. Specific measures include:

- Assessment values under \$20,000 per unit. The average assessed value for single-family and duplex homes in the neighborhood are approximately \$21,000 - \$22,000. A value below this average provides an indication on the condition of the housing stock. Low assessment values often are indicative of homes that are in disrepair and require a greater amount of investment in maintenance than other homes. Map 26 shows that the majority of homes with an assessed value of less than \$20,000 are located south of North Avenue.
- Owner occupancy of less than 40%. The average owner occupancy within the area is 49%. A higher level of home ownership is often associated with a neighborhood that is stable and a desirable place to live. In conjunction with the other measures, a low level of owner occupancy is used to indicate areas where there are opportunities for new housing development. Map 27 shows the Census blocks with owner occupancy of less than 40%.
- High vacancy rates, greater than 12.5%. The average vacancy rate for housing units within the neighborhood is approximately 14%. High vacancy rates can be used to identify areas that are perceived as being no longer desirable places to live and opportunities for new housing development. Vacant housing units, if unoccupied for long periods of time, fall into disrepair and create a blighting influence on the remaining homes. Map 28 shows the Census blocks with vacancy rates of greater than 12.5%.
- Loss of housing stock, more than 10 units per block. Census blocks with a loss of housing units indicate areas where demolition has already occurred and there are a

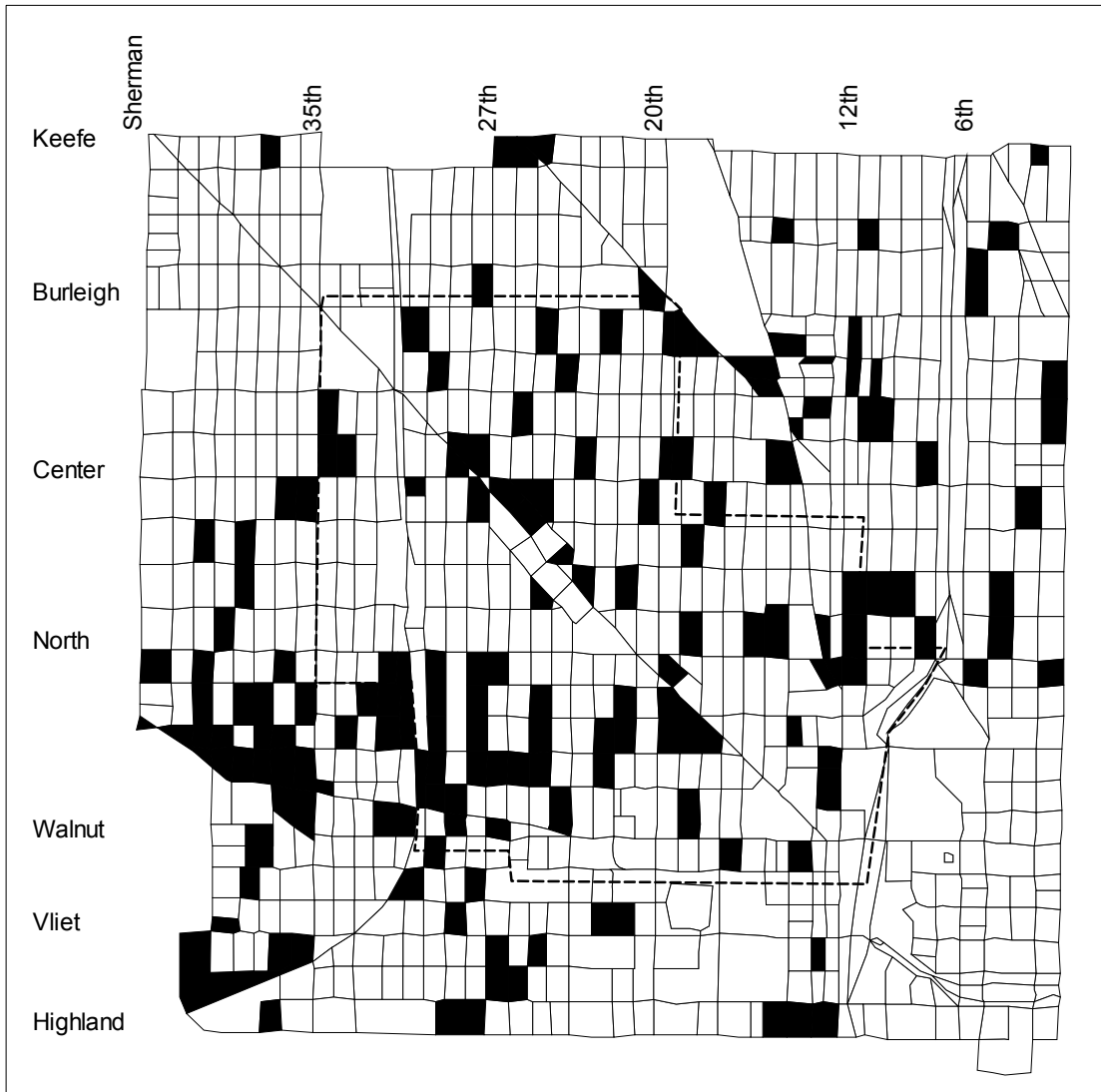
Map 26. Average Assessed Values Less Than \$20,000



Average Assessed Value, Duplex Parcels, 2001
Area Average = \$22,814, City Average = \$72,283 -- Source: MPROP

- Less than \$20,000
- all others

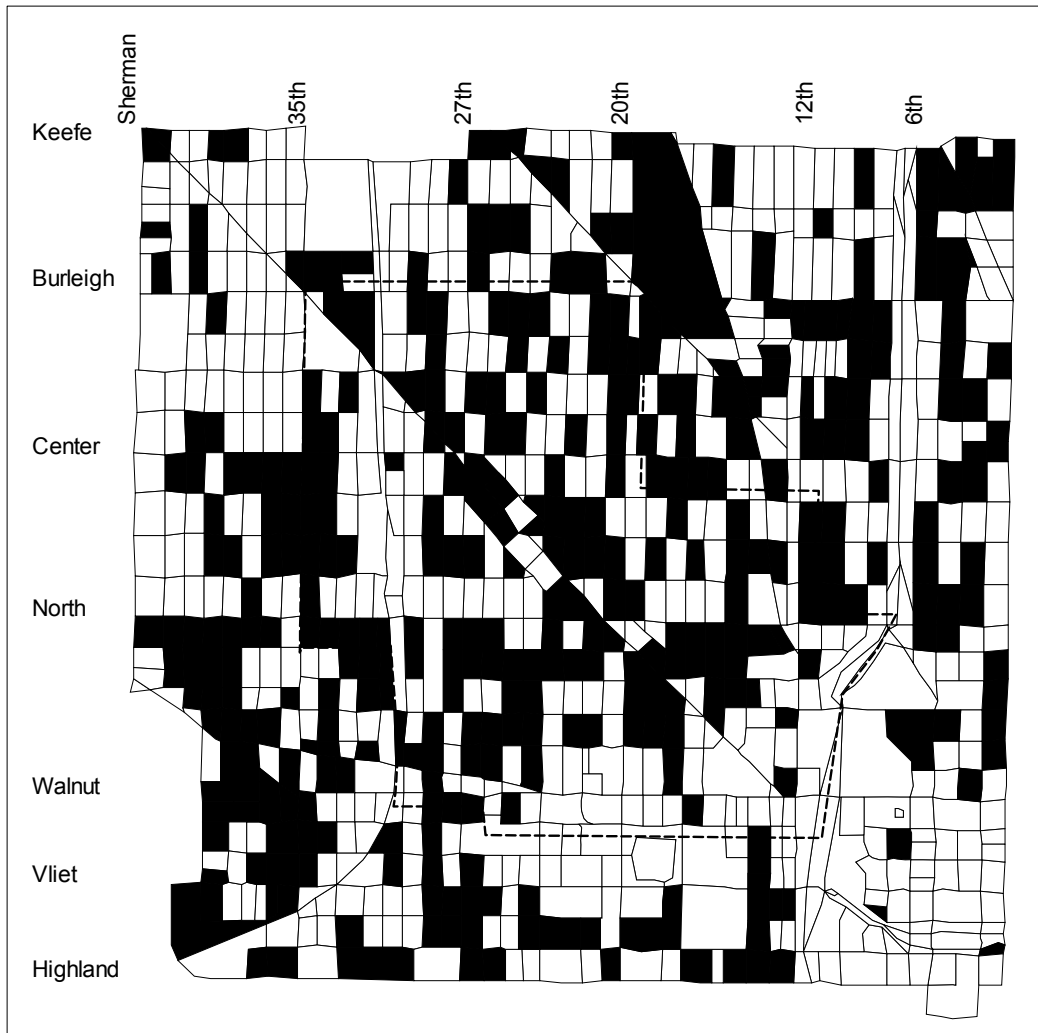
Map 27. Less Than 40% Owner Occupancy



Percent Single Family and Duplex Parcels Owner Occupied, 2001
Area Average = 49.3%, City Average = 79.2% -- Source: MPROP

■ less than 40.0%
□ 40.0% or more

Map 28. Greater than 12.5% of Housing Units Vacant



Percent Housing Units Vacant, 2000
Area Average = 14.2%, City Average = 6.0% - Source: 2000 Census File

- all others
- 12.5% or greater

greater number of lots available for new housing development. Map 29 shows the Census blocks that have lost 10 or more housing units.

The blocks bounded by 20th Street and 17th Street and by North Avenue and Vine Street exhibit all of the characteristics discussed above. This area has a large percentage of vacant housing units with average assessed values for single-family homes and duplexes under \$20,000 with owner occupancy at 40% or less. This area holds an opportunity to acquire vacant land and blighted parcels for cluster housing development. The momentum gained through cluster developments such as City Homes and Lindsay Heights can be continued through additional cluster development. Map 30 shows the Census blocks that meet or exceed the criteria listed above, and therefore offer opportunities for new housing development. All of the blocks highlighted in Map 30 have less than 40% owner occupancy. Four of the blocks meet all of the criteria while the remaining blocks meet at least three of the criteria. A majority of these blocks are located south of North Avenue.

Homes to the north of North Avenue generally should be addressed with housing conservation programs with the most intensive efforts east of 27th Street. These homes have higher average assessed values, a lower percentage of vacant housing units and a higher percentage of owner occupancy. A program might include providing resources to homeowners for maintenance and rehabilitation as well as enforcement activities.

Recommended Actions for Housing

1. Support efforts to reduce crime. A neighborhood that is perceived as being safe will help attract new homeowners into the area. Increase crime patrols and undertake aggressive code and nuisance abatement efforts to drive out illegal activity.

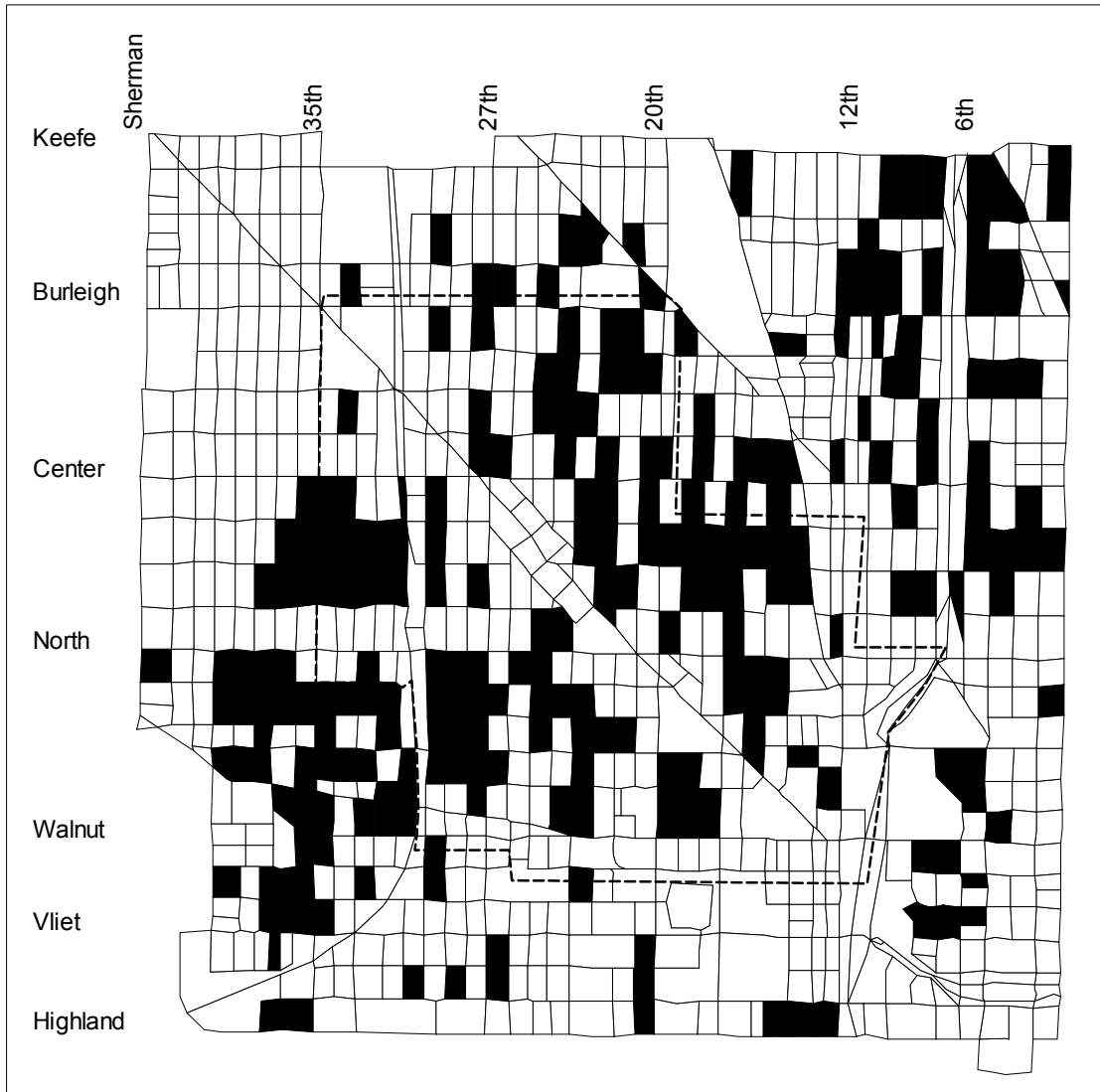
2. Implement housing conservation in the North and West sectors of the neighborhood. The homes in this area have higher assessed values, higher rates of owner-occupancy and a lower number of vacant units. Homeowners in this area may utilize the existing housing rehabilitation programs and resources offered by the City of Milwaukee.

The City should engage in an informational campaign or a “housing fair” within the Fond du Lac and North neighborhood. The City could distribute informational packets to residents about the various rehabilitation programs and resources offered by the City. The City, in conjunction with local contractors, could put on a housing fair where residents could come and ask questions of City staff and apply for the programs.

3. Locate new housing south of North Avenue, especially in areas shown in Map 30. These areas have low assessment values, low rates of owner-occupancy and a large number of vacant units creating more opportunities for new housing development.

The blocks between 24th Street and 30th Street from North Avenue to Lisbon Avenue offer the greatest opportunities for land assembly and new housing development. New housing development may include units similar to those found in City Homes and Lindsay Heights.

Map 29. Loss of Ten or More Housing Units



Change in Number of Housing Units, 1990 to 2000
Area Change = -2,121 -- Source: 1990, 2000 Census

- loss of ten or more housing units
- all others

New housing may also be developed near the intersection of Center Street and Fond du Lac Avenue. New housing could include a combination of townhouses and mixed-use development with retail below and residential above.

4. Support and encourage retail establishment development and retention that serves the needs of the neighborhood. Retail that provides basic goods and services to the neighborhood will make the area more attractive to people that already live in the neighborhood and to those looking to move into it.

New retail development is recommended at the intersection of Fond du Lac Avenue and Center Street. In addition to new retail development, this area could also support new housing development, such as townhouses. There are several parcels that are City owned/RACM properties as well as some vacant land and buildings.

5. Retail Market Analysis

Examination of the retail sector characteristics reveals a retail market with little activity. Many older retail establishments have left the area and clustered in shopping centers and malls rather than along retail strips. The prominence of the intersection of 20th and North Avenue as a regional shopping center, anchored by a Sears & Roebucks store has long since declined. The older retail establishments can no longer compete with the big national retailers in terms of pricing and selection.

The neighborhood exhibits characteristics of a “neighborhood or community shopping center” under the Urban Land Institute (ULI) classification system of retail shopping centers. Most of the retail businesses will serve customers in the immediate neighborhood and stores will be relatively small. Uses such as grocery stores, pharmacies, video rentals, convenience centers, restaurants and the like should predominate. Regional shopping, like big box retailers, are not likely to seek out the neighborhood for a store because the Midtown Center (formerly Capitol Court) shopping center and downtown are better locations for regional centers due to road access.

Although the neighborhood has indicators of low income, the sheer concentration of people and households presents a large buying public. Much of that public is transit-dependent making the area relatively attractive for neighborhood or community retailing.

Opportunities for retailing best exist in locations where transit accessibility is maximized: the intersections of 27th and Center Street, along North Avenue and the intersection of 20th and North Avenue.

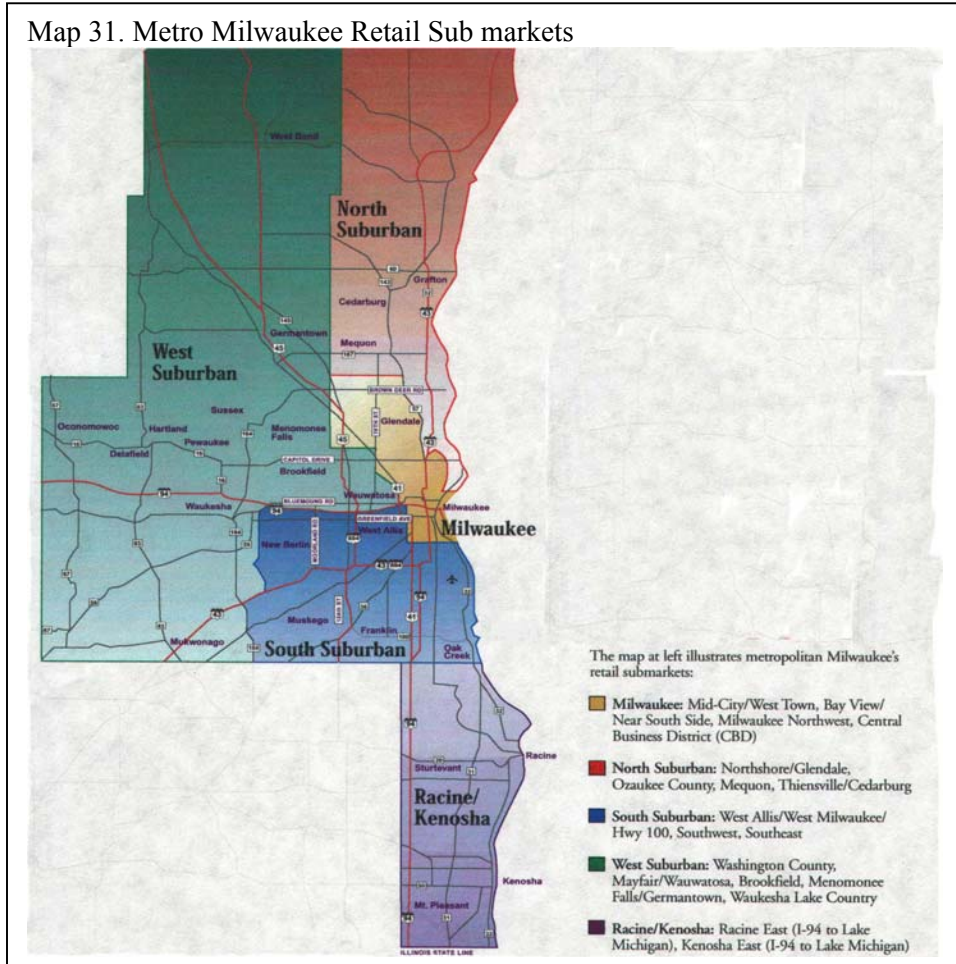
5.1 Market Characteristics

The neighborhood has several historic retail corridors: North Avenue, Fond du Lac Avenue, Walnut Street and Lisbon Avenue. Each corridor can be characterized as having deteriorating and outdated appearances, lack of cohesive design standards and poor tenant mix. All of these are “neighborhood retail centers” under the Urban Land Institute’s classification system for shopping centers. (Dollars and Cents of Shopping Centers: 2000) Neighborhood shopping centers generally provide goods and services at convenient locations for the day-to-day needs of the neighborhood residents. They differ from regional centers that serve larger areas and act as destinations for special, large or one-time purchases. Instead, neighborhood shopping centers typically have grocery stores, drug stores, cleaners, dentists, medical facilities, video stores and the like.

Data for neighborhoods is rare. Typically market data is collected on much larger geographic areas. Nonetheless, some data does exist.

Sub-Market Location

The Fond du Lac and North Neighborhood retail market is part of the Milwaukee sub market of metropolitan Milwaukee. Map 31 shows the retail sub markets within the Metro Milwaukee area. Retail data is not available for this small of an area. The data that is available is of limited use, but does indicate relative conditions.



According to the 2000 Mooney Le Sage (MLG) Retail Market Study, the Milwaukee retail sub market accounted for 20% of the retail space in metropolitan Milwaukee. The Milwaukee retail sub market is further divided into five areas: Mid-City, West Town, Milwaukee Northwest, Central Business District and Bay View/Near South Side. Retail vacancy rates in the West Town area, which includes the Fond du Lac and North Neighborhood, were among the highest within the Milwaukee retail sub market. West Town vacancy rates of 8.7 percent were second only to those of the Central Business District (12.4 percent).

However, the MLG Market Study discussed above may not fully reflect the retail market within the Fond du Lac and North Avenue neighborhood. The MLG Market Study looks at retail space that is 10,000 square feet or greater and does not consider mixed-use developments. A large portion of the retail space in the neighborhood is mixed use with less than 10,000 square feet and residential or other commercial uses above.

Average retail lease rates within the project area are \$5.00 per square foot compared to \$8.00 to \$15.00 per square foot, net lease, in Milwaukee. For comparison, retail rental rates in the Midtown Center area are \$4.00 to \$15.00 per square foot. Retail space along King Drive goes for \$7.00 to \$14.00 per square foot.

The Department of City Development conducted an inventory of parcels and businesses along Fond du Lac Avenue. The inventory included Fond du Lac Avenue from 21st Street to 37th Street, North Avenue from 18th Street to 22nd Street and sections of Center and Burleigh Streets. 33.82% of the parcels surveyed, or 70 parcels, were vacant. In terms of available land, approximately 57 acres of land were included in the inventory, of which 7 acres including both land and buildings, 12.91%, is vacant.

The Department of City Development also conducted an inventory of parcels and businesses along North Avenue between I-43 and 35th Street. This area had a vacancy rate of 50.9%. For comparison, King Drive has a vacancy rate of 24.4% and the area near the Midtown Center (formerly Capitol Court) has a vacancy rate of 5.6%.

Rental Rates

The neighborhood offers retail space at a discounted price compared to surrounding retail areas. Vacancy rates throughout the Milwaukee area are higher than outlying suburban areas. This indicates that a majority of national retailers continue to look for development opportunities in the surrounding suburbs. However, a few pioneering developers and retail firms are establishing a presence in the neighborhood at higher market rates.

Table 35 below provides a sample of the retail properties for sale or lease in the neighborhood and influence areas. The available space is also shown in Map 32.

Table 35. Available Retail Space Within the Neighborhood and Area of Influence

Building / Address	Rental Contact	Total Sq. Ft.	Available Sq. Ft.	Rental Price
Neighborhood				
North Ave Commerce Center*				
2341 N. 25th Street	James T. Barry Co. Inc.	55,000	22,000	\$4.00n
Community Financial Center				
N. 27th & Fond du Lac Ave	Commercial Property Assoc.	20,000	16,000	\$12.00n
Area of Influence				
Coakley Mayflower				
2151 N. King Drive	C.H.Coakley & Co.	470,000	105,000	\$5.00mn
Coakley Mayflower				
3742 W. Wisconsin Ave	C.H.Coakley & Co.	101,000	40,000	Negotiable
3517 W. North Ave	The Polacheck Co. Inc.	62,000	2,600;3,600	\$12.00mn
Midtown Center				
W. Capitol between Fond du lac & 60th St.	The Polacheck Co. Inc.	300,000	N/A	\$18.00mn

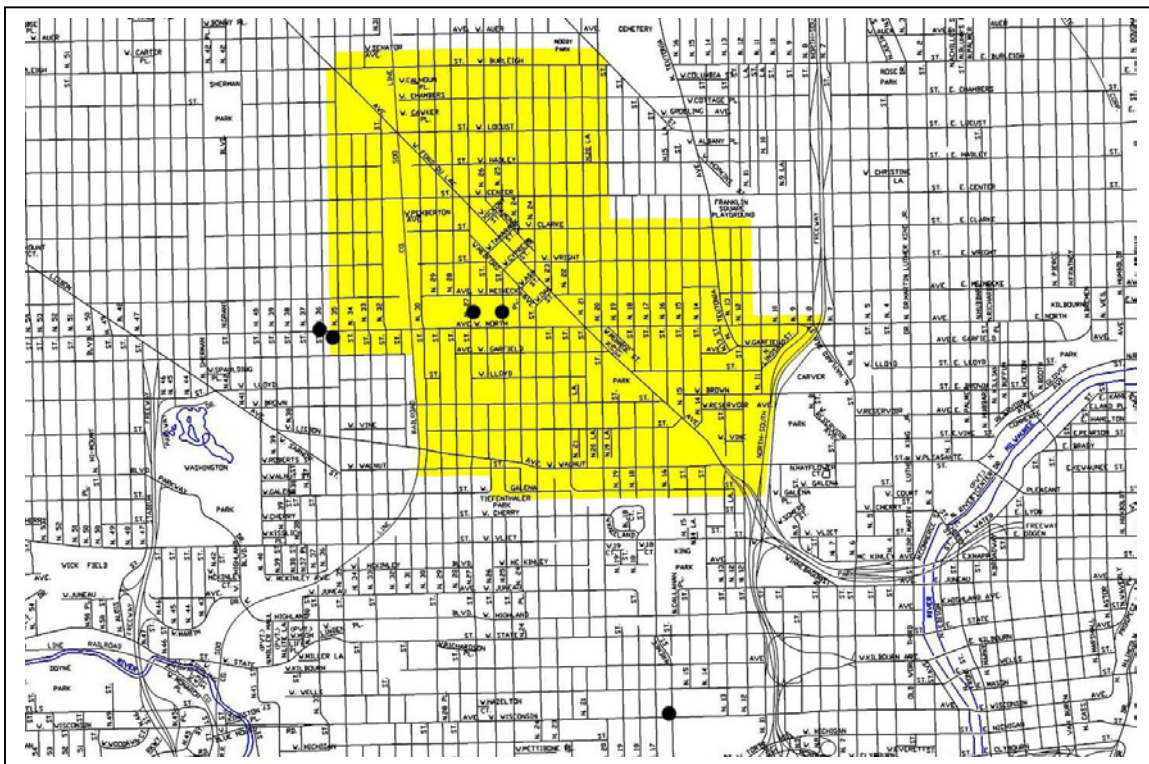
Source: The Business Journal, Commercial Real Estate Quarterly September 20, 2002

* Building was developed for light industrial uses, but commercial uses are permitted.

Lease Terms

Net (n): The tenant pays rent and expenses such as taxes, insurance and maintenance on the property or space. Triple-Net (NNN): The tenant pays rent and all operating expenses of the property or space. Gross (g): The landlord pays property expenses, such as major maintenance.

Map 32. Available Retail Space within the Neighborhood and Area of Influence



Inventory of Retail Businesses

We conducted a windshield inventory of all street-level retail, commercial and institutional uses in the area in September 2001. Table 36 below shows the inventory of businesses in the neighborhood.

Table 36. Fond du Lac and North Neighborhood Retail Windshield Analysis

Store Type	Number	% of Total	Store Type	Number	% of Total
BARS & RESTAURANTS			GENERAL SERVICES		
Bars	22	12.15%	Automotive Services	11	6.08%
Eat In	2	1.10%	Bank & Check Cashing	3	1.66%
Fast Food/Sandwich Shops	14	7.73%	Barber/Beauty Salons	5	2.76%
Total	38	20.99%	Construction Services	3	0.55%
FOOD & LIQUOR STORES			Laundry & Dry Cleaners	3	1.66%
Liquor Stores	7	3.87%	Sewing/Embroidery	1	0.55%
Grocery (Full Service)	2	1.10%	Telephone/Pager/Cellular	1	0.55%
Grocery (Convenience)	23	12.71%	Dentist/Optometrists	3	1.66%
Produce	2	1.10%	Gas Stations	12	6.63%
Seafood	2	1.10%	Funeral Home	1	0.55%
Farmer's Market	1	0.55%	Locksmith	1	0.55%
Total	37	20.44%	Window Cleaning	1	0.55%
RETAIL STORES			Tax Preparation	2	0.55%
Audio/Visual Music	4	2.21%	Business Services	1	0.55%
Automotive Supplies	7	3.87%	Nail Salons	1	0.55%
Building Materials & Supplies	4	2.21%	Day Care	8	14.04%
Carpet & Rug Cleaning/Sales	1	0.55%	Total	57	31.49%
Clothing/Shoes	9	1.66%	ENTERTAINMENT		
Cosmetics/Beauty Supply	3	1.10%	Museums	1	0.55%
Pharmacy/Drug Store	2	1.10%	Total	1	0.55%
Furniture	2	1.10%	INSTITUTIONAL		
Paint Supplies/Sales	1	0.55%	Blood Banks	3	1.66%
Resale Shop	3	1.66%	Food Pantry	1	0.55%
Variety Stores	1	0.55%	Total	4	2.21%
Appliance	1	0.55%	TOTAL		
Gifts	1	0.55%	181		
Jewelry	3	1.66%			
Misc Reatil	2	1.10%			
Total	44	24.31%			

Streets: Fond du Lac Avenue, North Avenue, Lisbon Avenue, Walnut Street, Burleigh Street, Locust Street, & Center Street

Table 37 below shows the regional and national retail chains that have located in the Fond du Lac and North neighborhood. The national and regional retailers that have located in the neighborhood are primarily service retailers, such as gas stations and fast food restaurant chains. National retailers provide the neighborhood with a better mix of goods and services at lower prices.

Table 37. National & Regional Chains in Neighborhood

Chain	National (N) or Regional (R)	Number in Neighborhood
Amoco	N	3
Checkers Auto	R	1
Checkers Burgers	R	2
Cingular	N	1
Citgo	N	4
Gold Rush Chicken	R	1
Goodyear	N	1
H & R Block	N	1
Jewel-Osco	R	1
KFC/Taco Bell	N	1
McDonald's	N	2
Phillips 66	N	1
Popeye's	R	2
Rent-A-Center	R	1
Shell	N	1
Walgreens	N	1
Western Union	N	1

We compared the inventory of neighborhood businesses and institutions to those typically found in neighborhood or community shopping centers according to the Urban Land Institute's publication of Dollars and Cents of Shopping: 2000. That information is shown in Table 38.

Table 38. Comparison of Retail Business Inventory

Category	Shopping Center Type	Number in Neighborhood
General Merchandise		
Discount Department Store	C	0
Food		
Supermarket	N&C	2
Food Service		
Restaurant w/o liquor	N	2
Restaurant with liquor	N&C	0
Fast Food/Sandwich Shop	N&C	14
Pizza	N&C	0
Chinese Fast Food	N	0
Clothing and Accessories		
Women's Specialty	N&C	0
Women's Ready-to-Wear	N&C	2
Shoes		
Family Shoes	C	1
Home Furnishings		
Furniture	C	1
Gifts/Specialty		
Cards and Gifts	N&C	1
Jewelry		
Jewelry	C	3
Liquor		
Liquor/Wine	N	7
Drugs		
Drug Store/Pharmacy	N&C	2
Other Retail		
Eyeglasses/Optician	C	1
Cosmetic and Beauty Supplies	C	3
Personal Services		
Women's Hair Salon	N&C	5
Dry Cleaner	N&C	3
Unisex Hair	N&C	0
Videotape Rentals	N	0
Nail Salon	N&C	1
Financial		
Banks	N&C	3
Finance Company	N	0
Insurance	N	0

Includes stores along North Avenue, Fond du Lac Avenue, Center Street, Locust Street, Burleigh Street, Lisbon and Walnut Street

Source: Dollars and Cents of Shopping Centers: 2000 (Urban Land Institute)

N= Neighborhood ; C = Community

As discussed in Dollars and Cents of Shopping Centers: 2000, a “neighborhood shopping center” is defined as the sale of convenience goods and personal services to meet the day-to-day living needs of the immediate neighborhood. Neighborhood shopping centers may

be built around a supermarket and have 30,000 to 100,000 square feet of retail space. A community shopping center provides a wide range of goods, such as apparel and appliances, in a greater variety. Community shopping centers may be built around a department store, variety store or discount department store with 150,000 to 500,000 square feet of retail space.

Comparisons of retail services that exist in the neighborhood against those typically found in a neighborhood or a community shopping area provides a “first impression” look at market opportunities. The absence of a retail service identifies potential opportunities for the neighborhood.

Table 38 shows that, while the neighborhood may be adequately served by many retail services, it lacks others including: women’s specialty clothing, videotape rentals, dine-in restaurants, insurance and finance companies, pizza parlors and Chinese fast food. This presents potential opportunity for recruitment although care must be taken to make sure those same businesses are not being recruited into the Midtown Center or Downtown areas which may negate the opportunity in this neighborhood.

Synthesis of Retail Supply and Demand

We analyzed the market using secondary data sources, interviews, and focus groups to refine the first impression findings presented earlier. To complete this, we assessed buying power (demand) against the expected supply of neighborhood businesses to measure any surplus or deficit of retail services in the neighborhood. Our interest is primarily in identifying retail deficits because they represent recruitment opportunities. Consumer expenditure data was obtained from 1999 Claritas. The data details consumer expenditures in 12 retail categories, such as food, furnishings and clothing, within a 1 and 3-mile radius of Fond du Lac and North Avenue. Retail demand is based on the total consumer expenditures and expenditures for each retail category. Total consumer retail expenditures within the 1-mile radius are \$168,700,000 in 1999. For the 3-mile radius, consumer retail expenditures totaled \$1,753,800,000.

The total income for the 1-mile radius is \$154,478,904 in 1999. The average household income was \$19,714 with 7,836 households in the area. The 3-mile radius had a total income of \$2,039,803,464. The average household income was \$27,388 with 74,478 households in the area. These numbers may vary from other sources but should be generally indicative of buying power in the neighborhood.

Supply for each retail area was obtained from the 1997 Economic Census. The number of stores within the project area was obtained from 1999 Claritas. Supply for each retail area within the project area was calculated using Milwaukee County sales. The amounts are adjusted to represent 1999 levels. A detailed explanation for the retail market analysis can be found in Appendix 3.

Table 39 represents the supply and demand for each retail area within the one-mile radius of Fond du Lac and North Avenue. The shortfall column represents the difference between consumer demand and the supply of retail establishments and, therefore, the additional sales could be supported within the area. A negative number indicates a

saturation of a retail activity within the market area. For example, Table 39 indicates a surplus of \$42.7 million in grocery retail sales in a 1-mile radius of the Fond du Lac and North Avenue intersections. This surplus may be a location anomaly within this artificial market area, but it does indicate that anyone considering a grocery store in this area needs to be mindful that the market has plenty of supplies and competition will be keen.

Table 39. One-Mile Radius Shortfall

	Adjusted Supply	Demand	Shortfall
Apparel & Accessories	\$ 3,990,368.38	\$ 7,050,904.33	\$ 3,060,535.95
Auto Dealers	\$ -	\$ 32,873,696.82	\$ 32,873,696.82
Auto & Home Supply	\$ 1,974,425.47	\$ 1,556,693.16	\$ (417,732.31)
Drug & Proprietary	\$ 2,084,058.60	\$ 8,058,176.38	\$ 5,974,117.78
Eating & Drinking Places	\$ 6,094,125.35	\$ 16,116,352.76	\$ 10,022,227.40
Food Stores	\$ 65,792,881.71	\$ 23,075,686.90	\$ (42,717,194.81)
Furniture/Furnishings	\$ 1,670,038.04	\$ 5,036,360.24	\$ 3,366,322.20
Appliance, Radio & TV	\$ 11,267,149.65	\$ 7,417,185.08	\$ (3,849,964.57)
Gas Stations	\$ 8,999,861.01	\$ 7,875,036.01	\$ (1,124,825.00)
General Merchandise	\$ 2,329,875.52	\$ 19,962,300.58	\$ 17,632,425.06
Hardware, Lumber & Garden	\$ 3,137,910.22	\$ 9,157,018.61	\$ 6,019,108.39
Department Stores	\$ -	\$ 18,222,467.04	\$ 18,222,467.04

Based upon the preliminary market analysis for the 1-mile radius of Fond du Lac and North, retail opportunities that might be considered for the neighborhood include:

- eating & drinking places;
- general merchandise;
- apparel & accessories;
- drug & proprietary;
- auto dealers; and
- furniture/furnishings.

Conversely, the one-mile neighborhood appears to be over-served by food stores, appliance stores and gas stations.

Many businesses, like auto dealers tend to locate near other auto dealers in clusters that serve regional markets. Other retailers exhibit similar tendencies. This list should be viewed as preliminary with greater refinement needed.

The market for a three-mile radius was examined to determine how these opportunities or indicators of saturation might be affected. Specifically, we were looking for evidence that a geographic quirk might have skewed the numbers. For example, food stores typically serve areas larger than one square mile. Location of a large store just within the one-mile radius may give a misleading indicator of saturation. Conversely, location of a grocery store just outside the one-mile boundary may indicate a false opportunity.

Table 40 represents the supply and demand for each retail area within the three-mile radius of Fond du Lac and North Avenue. The shortfall column represents the difference between consumer demand and the supply of retail establishments and, therefore, the additional sales can be supported within the area. Those retail trade areas with a negative number indicate that there is not a need for additional stores in the area.

Table 40. Three-Mile Radius Shortfall

	Adjusted Supply	Demand	Shortfall
Apparel & Accessories	\$ 42,297,904.81	\$ 94,325,499.45	\$ 52,027,594.64
Auto Dealers	\$ 89,742,443.14	\$ 441,620,125.03	\$ 351,877,681.89
Auto & Home Supply	\$ 15,795,403.77	\$ 20,353,837.74	\$ 4,558,433.97
Drug & Proprietary	\$ 50,017,406.41	\$ 106,654,109.73	\$ 56,636,703.32
Eating & Drinking Places	\$ 148,290,383.64	\$ 212,145,143.02	\$ 63,854,759.39
Food Stores	\$ 460,550,172.00	\$ 303,214,028.43	\$ (157,336,143.56)
Furniture/Furnishings	\$ 41,750,950.90	\$ 67,342,125.99	\$ 25,591,175.09
Appliance, Radio & TV	\$ 33,801,448.94	\$ 98,396,266.99	\$ 64,594,818.06
Gas Stations	\$ 66,598,971.47	\$ 103,397,495.69	\$ 36,798,524.23
General Merchandise	\$ 6,989,626.56	\$ 262,506,352.96	\$ 255,516,726.41
Hardware, Lumber & Garden	\$ 25,103,281.78	\$ 121,425,180.55	\$ 96,321,898.77
Department Stores	\$ 24,636,165.10	\$ 239,826,362.34	\$ 215,190,197.24

Based upon the preliminary market analysis for the 3-mile radius of Fond du Lac and North, the retail opportunities for the neighborhood include:

- eating & drinking places;
- general merchandise;
- apparel & accessories;
- hardware, lumber & garden;
- appliance, radio & TV; and
- auto dealers

Note, however, that neighborhood or community shopping centers do not typically have auto dealers; home supply; and appliance, radio and TV stores. Nor do they typically have hardware, lumber and garden stores. Therefore, a more realistic set of opportunities exist in the following sectors:

- Eating and Drinking Places
- General Merchandise
- Apparel and Accessories
- Drug and Proprietary Stores
- Furniture and Furnishings

The preliminary market analysis for the one and three- mile radius of Fond du Lac and North Avenue showed that the supply of grocery stores in the area exceeded demand. Many of the grocery stores in the neighborhood are corner grocery stores/ convenience stores.

The preliminary market analysis is used to highlight specific retail areas for further consideration, and to determine the size and number of stores that could be developed in the neighborhood. The Dollars and Cents of Shopping Centers:2000 provides data on sales and gross leasable square area (GLA) for local, independent and national chains. This involved placing the ULI typical tenants into categories of opportunity. Using this organization, we used the median sales per square foot and median GLA to determine the number of stores of each type that could be supported in the neighborhood. Table 41 below shows the number of “supportable” retail stores for the one-mile radius around Fond du Lac and North Avenue.

Table 41. Potential New Stores-Retail – Within a One-Mile Radius

Category	Estimated Shortfall	Median Sales per Sq Foot	Maximum Supportable Sq. Feet	Median Store Size (sq. ft.)	Potential Number of New Stores
<i>General Merchandise</i>	\$ 17,632,425				
Discount Department Store		\$ 157.15	112,201	80,477	1
<i>Eating and Drinking Places</i>	\$ 10,022,227				
Restaurant w/o liquor		\$ 186.00	53,883	3,075	
Restaurant with liquor		\$ 228.12	43,934	3,381	
Sandwich Shop		\$ 231.74	43,248	1,300	
Chinese Fast Food		\$ 105.82	94,710	1,500	
<i>Category Average</i>		\$ 187.92	\$ 58,944	\$ 2,314	25
<i>Apparel and Accessories</i>	\$ 3,060,535				
Women's Specialty		\$ 299.79	10,209	1,509	
Women's Ready-to-Wear		\$ 293.18	10,439	2,750	
Family Shoes		\$ 176.20	17,370	3,432	
<i>Category Average</i>		\$ 256.39	12,673	2,564	5
<i>Furniture and Furnishings</i>	\$ 3,366,322				
Furniture		\$ 192.00	17,533	4,860	4
<i>Drug and Proprietary Stores</i>	\$ 5,974,117				
Drug Store/Pharmacy		\$ 305.46	19,558	9,100	
Cards and Gifts		\$ 164.77	36,257	2,480	
Eyeglasses/Optician		257.04	23,242	1,523	
Cosmetic and Beauty Supplies		254.05	23,516	1,649	
Women's Hair Salon		\$ 132.97	44,928	1,200	
Dry Cleaner		\$ 134.23	44,507	1,500	
Unisex Hair		\$ 159.88	37,366	1,306	
Videotape Rentals		\$ 88.60	67,428	3,675	
Nail Salon		\$ 71.54	83,507	1,048	
<i>Category Average</i>		\$ 174.28	42,257	2,609	16

This analysis presents the most opportune prospects potentially recruited to the neighborhood and an estimate of new stores that could be supported by demand from the neighborhood.

Again, the numbers imply precision that does not necessarily exist. Store sizes and sales per square foot will vary significantly by type of store, individual owner and location. The number of potential new stores will vary, perhaps significantly, based upon the mix and type of stores actually recruited. In Appendix 4, a more exhaustive list of retail users and their specific site requirements as future reference is provided. We also learned from discussions with developers and brokers that many small retailers prefer to locate in freestanding buildings or “endcap” buildings visible from two sides of a retail strip. While this is not an absolute, it does signal a preference for visibility unable to be met in many existing neighborhood commercial buildings. This preference has strong implications for retail development. Market preferences show that efforts to place new retailers in existing storefronts will be met by strong resistance unless something can be done to make the urban face look distinctive and attractive to shoppers. This is particularly true for users that act as anchors or traffic generators for other retailers.

Data for a three-mile radius around the intersection of Fond du Lac and North Avenues was also examined. That information is shown in Table 42.

Table 42. Potential New Stores-Retail-Within a Three-Mile Radius

Category	Estimated Shortfall	Median Sales per Sq Foot	Maximum Supportable Sq. Feet	Median Store Size (sq. ft.)	Potential Number of New Stores
General Merchandise	\$ 255,516,726				
Discount Department Store		\$ 157.15	1,625,942	80,477	20
Eating and Drinking Places	\$ 63,854,759				
Restaurant w/o liquor		\$ 186.00	343,305	3,075	
Restaurant with liquor		\$ 228.12	279,917	3,381	
Sandwich Shop		\$ 231.74	275,545	1,300	
Chinese Fast Food		\$ 105.82	603,428	1,500	
Category Average		\$ 187.92	\$ 375,549	\$ 2,314	162
Apparel and Accessories	\$ 52,027,595				
Women's Specialty		\$ 299.79	173,547	1,509	
Women's Ready-to-Wear		\$ 293.18	177,460	2,750	
Family Shoes		\$ 176.20	295,276	3,432	
Category Average		\$ 256.39	215,427	2,564	84
Furniture and Furnishings	\$ 25,591,175				
Furniture		\$ 192.00	133,287	4,860	27
Drug and Proprietary Stores	\$ 50,717,406				
Drug Store/Pharmacy		\$ 305.46	166,036	9,100	
Cards and Gifts		\$ 164.77	307,807	2,480	
Eyeglasses/Optician		257.04	197,313	1,523	
Cosmetic and Beauty Supplies		254.05	199,636	1,649	
Women's Hair Salon		\$ 132.97	381,420	1,200	
Dry Cleaner		\$ 134.23	377,840	1,500	
Unisex Hair		\$ 159.88	317,222	1,306	
Videotape Rentals		\$ 88.60	572,431	3,675	
Nail Salon		\$ 71.54	708,938	1,048	
Category Average		\$ 174.28	358,738	2,609	138

The same caveats stated in Table 41 apply here. The area involved in the three-mile radius overlaps with the Downtown and Midtown Center markets.

5.2 Sector Assets

The intersection of Fond du Lac and North Avenue was historically a regional retail site, but after the departure of the Sears & Roebuck the area is no longer considered a regional shopping center. Many local retail businesses have been in the area for a number of years, including Lena's Foods, United Auto Parts, Fred's Doors, Jake's Deli, Columbia Savings and Loan, Milwaukee Paint, Gold Rush Chicken and others. Many of these long-term businesses are minority owned and form a strong foundation in the community and exemplify the spirit and ability to be financially successful in an older urban area populated by low-income households.

Despite relatively low household incomes, the neighborhood has among the highest concentration of income per square mile of Milwaukee neighborhoods and surrounding areas. The neighborhood also has a large number of people per square mile. As a neighborhood, it has more purchasing power than many other areas in the City or suburbs. Table 20 shows the comparison of purchasing power between the Fond du Lac and North neighborhood and other areas within Milwaukee County.

The neighborhood has high traffic counts, which also helps to attract new retail to the area. Data provided from the Milwaukee Department of Public Works showed that approximately 20,000 vehicles traveled along North Avenue and over 30,000 vehicles traveled along Fond du Lac Avenue. In comparison, traffic counts for Villard Avenue are approximately 12,000 vehicles per day, 32,000 vehicles per day for Silver Spring Drive and 38,000 vehicles per day for Good Hope Road. This is an important factor because the potential demand is, at least in part, a function of traffic exposure and most successful businesses require high visibility and accessibility. It is true that many neighborhood residents are transit dependent. An equal, if not greater, number of neighborhood residents do have access to a privately-owned vehicle. Those residents, plus persons passing through the neighborhood, indicate potential demand.

There is a unique opportunity for pedestrian-oriented neighborhood businesses in this area due to the number of residents without vehicles. 2000 Census data for the neighborhood showed that approximately 42% of the population did not have a vehicle available to them. The Employment and Training Institute conducted a study in 1998 looking at transportation barriers to employment and found that only 62% of central city workers used a car to get to and from work. Over 90% of workers in suburban areas were found to use a car to travel to and from work. Therefore, a large section of neighborhood residents are dependent on local businesses or using public transit to purchase necessary items. Retail businesses that serve the local market in the Fond du Lac and North neighborhood will generate business not only from high traffic counts, but also from the large population that does not own an automobile.

The neighborhood is well served by public transportation, which includes the possible construction of a light rail route through the southern section of the neighborhood. Public transportation not only enables residents to travel within the area, but it also enables people outside the neighborhood to have access to local businesses.

Businesses are in the early stages of organizing themselves toward a common goal. The North Avenue Community Development Corporation has been formed and is actively organizing businesses along North Avenue and promoting North Avenue as a place for more businesses to locate. Legacy Bank sought the architecturally significant bank building at 20th Street and North Avenue. As the first women-owned bank in Milwaukee, it is aggressively seeking development and banking opportunities in the neighborhood. Their activities focus on addressing concerns regarding crime and safety, retail recruitment and upkeep or maintenance throughout the area. Businesses that locate within the neighborhood will benefit from a supportive environment through which to address concerns and issues.

Another asset for the neighborhood is the amount of developable land that is available to other areas. According to an inventory of businesses provided by the Department of City Development, approximately 7 acres of vacant land exist along Fond du Lac Avenue, North Avenue and sections of Center and Burleigh Streets.

There is also a supply of architecturally significant buildings that may form the basis of a dynamic urban neighborhood. A report completed by the Main Street National Trust highlighted the Legacy Bank building, Sears building, Wisconsin Black Historical Society, Satin Doll Lounge, Columbia Savings & Loan and Merzrath's Embroidery Shop as possible sites of architecturally or historically significant buildings.

5.3 Sector Weaknesses

According to stakeholder interviews, the perception of crime in the neighborhood is a serious weakness. While statistics show that perception is probably worse than the reality, people are investing based on market perception of crime. Crime statistics provided by the City of Milwaukee show that since 1990, overall crime has decreased by 67% within the neighborhood. However, businesses continue to see the area as unsafe for their employees and their property.

The age, quality and availability of existing retail space may limit the development of new businesses in the neighborhood. The typical existing retail outlet is small, old and relies on street parking. Mechanical, electrical and plumbing systems are usually not modernized. Floor areas are typically small, designed to accommodate a former retail business that served a local market. Small buildings must compete against the larger and better equipped stores that offer greater variety and can spread fixed overhead costs over a larger sales base. Second floor commercial space is not in demand by the market. The blighted image of the former retail corridors is a serious impediment to retail development. Besides signaling neglect and attracting vandals, older, vacant deteriorating buildings concern developers and business owners. Developers fear their

buildings may not be “worth” what they paid and business owners fear they will not attract customers.

5.4 Market Dynamics

The neighborhood has seen signs of development and revitalization. Local businesses in the area are reinvesting or expanding, such as Columbia Savings and Loan, Legacy Bank and Lena’s Grocery Store. Columbia Savings and Loan is proposing to develop on the opposite corner from their current location and adding a drive-through service. Legacy Bank is remaining at its current location, but adding a drive-through service. The Fondy Market is undergoing renovations to allow for more space and year-round use of the market area. Recent solicitation of development proposals along Fond du Lac Avenue by the Department of City Development showed over \$8 million of investment by local commercial property owners and retailers.

Perhaps the strongest dynamic is the recognition by national retailers that profits can be made in this neighborhood because of the density of population and related purchasing power. The first to discover this were food and gas stations like KFC, Burger King, McDonald’s and Citgo. They were followed by pharmacies like Walgreens and Osco Drugs. A Jewel-Osco has been completed on the corner of 35th Street and North Avenue. Super K-Mart at one time considered the corner of Fond du Lac and North Avenue as a future development site and this had attracted interest from retail businesses for the outlots. The current national bankruptcy problems of K-Mart do not obviate the reality that retail opportunities exist in the neighborhood.

An African American Cultural Center is planned for a site along Fond du Lac Avenue in Johnsons Park. The African American Cultural Center will serve as a way of attracting people to the neighborhood and creating additional business for local retailers. These retail developments provide evidence of broader market interest in the neighborhood.

Midtown Center is currently under redevelopment. The Midtown Center project is the demolition of the former Capitol Court shopping mall that is being replaced with other retail developments, including a Wal-Mart, a grocery store and home improvement center. The redevelopment of Midtown Center will create approximately 600,000 square feet of retail space. Midtown Center will be strong competition in the attraction of retail businesses to the neighborhood because it has much better access and has larger parcels of land available for development. This will affect the larger “community” shopping center users more than the neighborhood shopping center users.

The Grand Avenue Mall, located in downtown Milwaukee, is also being redeveloped. Boston Store has completed renovations to consolidate their merchandise onto two floors with apartments on the floors above. The current redevelopment plan will create larger retail space, 20,000 to 40,000 square feet, by moving the smaller retailers closer to the Boston Store and remodeling the remaining space.

Both of these developments are likely to limit further retail development in the Fond du Lac and North neighborhood to outlets that serve the immediate local market or specialty shops that can locate almost anywhere.

Specific questions have been asked about redevelopment of the former Sears building at Fond du Lac and North in light of the redevelopment at Midtown Center and the Grand Avenue Mall. These sites have much higher traffic counts and accessibility, therefore, they are logical sites of preference for retailers before the Sears building site. The contemplated development at these locations, if it occurs, will diminish but not eliminate the possibilities for redeveloping the Sears building site for retail use. It may, however, open other opportunities for housing, institutional, office or medical use and possibly retail use oriented toward neighborhood services that complements a national retailer. On the other hand, if K-Mart is not built, the former Sears site may offer a significant mixed-use retail/residential opportunity.

Despite the obvious advantages offered by the other sites, a national retailer coming to the neighborhood is a good sign of revitalization in the retail sector. While a national retailer will take up much of the shortfall demand for general merchandise, apparel and other services, other demand remains for retail development in other categories, particularly for those that might be attracted to and organized around a big or medium box retail traffic generator.

The entry of big box retailers and potentially others is a mixed blessing to the neighborhood. On one hand it signals recognition that there is a strong market for goods and services to support full-service retailers at competitive prices. Neighborhood residents benefit because they have better access to goods at competitive prices.

On the other hand, national chains, specifically big box retailers, with tremendous buying power may force out the existing small retailers that currently serve the area. Since many of those businesses are minority-owned, the retail emergence in the neighborhood may result in fewer minority-owned retailers.

Given competing pressures from Midtown Center and Grand Avenue Mall, it may be reasonable to expect that the neighborhood will not replace all the former retail outlets in the historical retail corridors. Choices will have to be made about where to encourage retail. One option is to promote North Avenue and Center Street because of close proximity to the geographic center of the neighborhood and to tie into the big box “anchor” of Jewel-Osco at 35th Street and North Avenue.

The best opportunities for retail development are in the areas exhibiting high levels of traffic and transit activity. This would mean intersections of North Avenue with Fond du Lac Avenue and the intersections of North Avenue and 27th Street. Other potentially good locations include 27th and Center Streets and 35th and Center Street. The intersection of Lisbon and 27th has reasonable traffic counts but transit activity is not as good as in other intersections.

Recommended Actions for Retail

1. Support efforts to reduce crime. A neighborhood that is perceived as being a safe place to have a business will help to attract new retail development and retain existing retail. Increase crime patrols and undertake aggressive code and nuisance abatement efforts to drive out illegal activities.
2. Support efforts of NACDC. NACDC is focused on marketing the area and attracting new business to North Avenue. Experience locally and nationally demonstrates that a focused sales or development responsibility leads to faster and greater development of older urban areas.
3. Search for smaller retail opportunities – not big box retail in areas of high traffic and transit as shown in Map 33. The high traffic counts and large number of people that use mass transit provide a large potential customer base for retail businesses that locate along these nodes.

New retail could be developed near the intersection of Fond du Lac and North Avenues. Retail space may range from 10,000-15,000 square feet. The analysis of potential new stores shows to the neighborhood showed that dine-in restaurants, clothing stores, or videotape rental stores could all be supported by local demand.

Additional new retail could be developed near Fond du Lac Avenue and Center Street. The retail space may range from 10,000 – 15,000 square feet. Various types of retail development could also be supported at this location. The location of the Center Street Library at this intersection may attract a coffee and/or sandwich shop.

In addition to the development of new retail space, existing retail developments should have façade improvements. Lighting, signage and landscaping will help create an identity for the area and help improve the perception of the neighborhood.

4. Consider the Sears site for retail or mixed-use concentration. The location is important because of its historical significance and epicenter of the neighborhood. The Sears building could be redeveloped with retail on the first floor and offices on the second and third floors. A medical clinic could be part of the redevelopment.

6. Commercial/Office Market Analysis

The market for office use is all but non-existent in the neighborhood for private, for-profit users. Some activity does exist for office space to house community oriented, non-profit corporations. Proximity to office buildings downtown and on Capitol Drive will likely keep demand for office space in the neighborhood to a minimum.

6.1 Market Characteristics

Sub Market Locations

The neighborhood is part of the downtown west market of Milwaukee. This area includes space near the Midwest Express Center, Grand Avenue Mall and surrounding neighborhoods. The only listed office space in the neighborhood is located in the North Avenue Commerce Center. Additional office space is located within the area of influence. The vacancy rates in the project area, 18.1%, are higher than the vacancy rates for the City of Milwaukee and the West Suburban market. Milwaukee’s downtown west market, which includes the project area, has lower vacancy rates than Ozaukee County, sections of Waukesha County and sections of the southern suburbs.

Lease Rates

The average gross lease rates for office space in this area are \$8 to \$12 per square foot. Gross lease rates for the City of Milwaukee and the West Suburban markets are \$12 to \$25 per square foot. Map 34 shows the office sub markets within the Metro Milwaukee area.

Map 34. Metro Milwaukee Office Sub markets

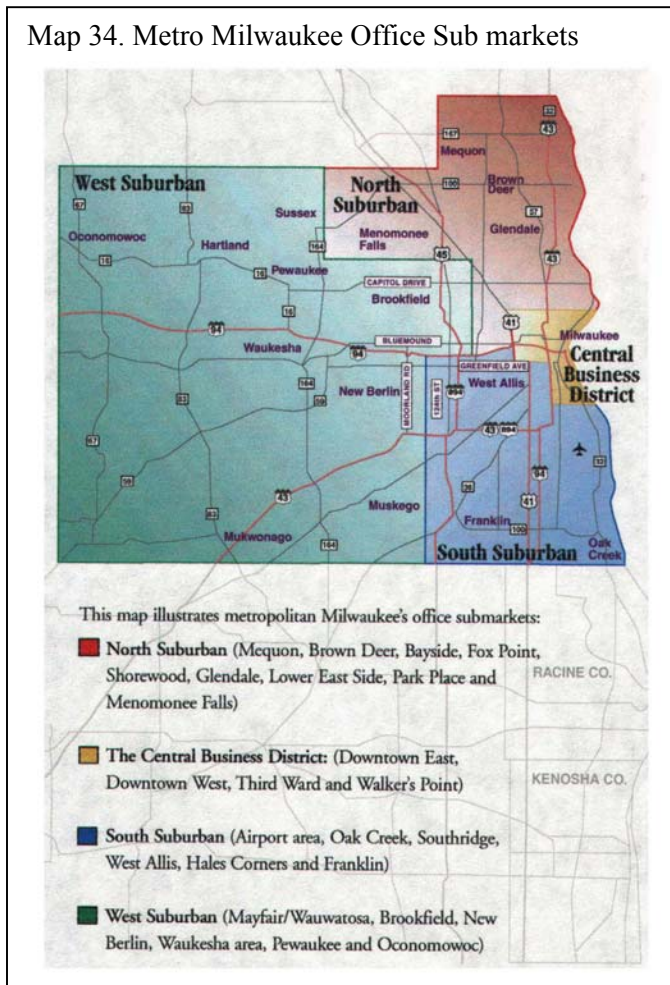


Table 43 below provides a sample of the office properties for sale or lease in the neighborhood and influence areas.

Table 43. Office Space Within the Neighborhood and Area of Influence

Building / Address	Rental Contact	Total Sq. Ft.	Available Sq. Ft.	Rental Price
Neighborhood				
North Avenue Commerce Ctr*				
2328-2364 N. 27th Street	James T. Barry Co. Inc./	112,812	90,000	\$4.00 n
2341N. 25th Street	Colliers International			
Area of Influence				
633 Building			20,800; 4,800	
633 W. Wisconsin Ave	Towne Reality	181,245	4,400; 3050	\$12-\$14.00g
Plaza 35				\$14.00/\$9.50
3505-35 W. Wisconsin Ave	Megal Development	28,754	2,881	Mod. Gross
Coakley Mayflower				
2151 N. King Drive	C.H. Coakley & Co.	470,000	125,000	\$5.00 NNN
The Bockl Building				
2040 W. Wisconsin Ave.	The Bockl Building	180,000	35,000	\$11.00
The Literature Center				
1933 W. Wisconsin Ave	Conklin Real Estate	30,000	5,000	\$13-\$15.00 g
2201 N. Martin Lither King Drive	Grubb & Ellis	16650	10055	\$12.00nnn
Coakley Mayflower				
3742 W. Wisconsin Ave	C.H. Coakley & Co.	101,000	40,000	Negotiable
Wells Fargo Plaza				
735 W. Wisconsin	Towne Reality	89,080	19,140	\$14.50g

Source: The Business Journal, Commercial Real Estate Quarterly September 20, 2002

* Building was developed for light industrial uses, but commercial uses are permitted.

Lease Terms

Net (n): The tenant pays rent and expenses such as taxes, insurance and maintenance on the property or space. Triple-Net (NNN): The tenant pays rent and all operating expenses of the property or space. Gross (g): The landlord pays all property expenses.

Modified Gross: The tenant may pay a portion of the operating expenses.

This neighborhood exhibits traits of “neighborhood shopping centers” under the Urban Land Institute’s classification. As such, non-retail commercial businesses exist to serve the immediate needs of the surrounding neighborhood residents and a relatively small number of non-retail establishments can be expected.

We compared the inventory of neighborhood businesses and institutions to those typically found in neighborhood or community shopping centers according to the Urban Land Institute’s publications: Dollars and Cents of Shopping Centers: 2000. That information is shown in Table 44.

The following is provided for definition purposes. As noted in the Dollars and Cents of Shopping Centers: 2000, a neighborhood shopping center is defined as the sale of convenience goods and personal services to meet the day-to-day living needs of the immediate neighborhood. Neighborhood shopping centers may be built around a supermarket and have 30,000 to 100,000 square feet of retail space. A community

shopping center provides a wide range of goods, such as apparel and appliances, in a greater variety. Community shopping centers may be built around a department store, variety store or discount department store with 150,000 to 500,000 square feet of retail space.

Table 44. Non-Retail Commercial Users

Category	Shopping Center Type	Number in Neighborhood
Financial		
Banks	N&C	3
Finance Company	N	0
Insurance	N	0
Offices (Other than Financial)		
Medical and Dental	N&C	2
Construction Services	NSL: Not specifically listed	3
Funeral Home	NSL	1
Window Cleaning	NSL	1
Tax Preparation	NSL	2
Business Services	NSL	1
Blood Banks	NSL	3

Source: Dollars and Cents of Shopping Centers: 2000 (Urban Land Institute)

Given the relatively small nature of this market segment and the low market rents commanded in this area, it is not likely that any directed efforts to attract or recruit new businesses to the neighborhood will produce significant results.

Attraction of some non-retail commercial use is possible but the nature of such users in a neighborhood setting suggests that it will be attracted to the same areas as retail users because of the visibility and access to neighborhood residents.

Obviously, from an economic standpoint, retail tenants can afford to pay higher rents and are more likely to pay closer to market-rate than non-retail commercial users. Non-retail commercial users could serve as infill development near the retail development.

Recommended Actions for Commercial

1. Support efforts to reduce crime. A neighborhood that is perceived as being safe may help attract new commercial development. Increase crime patrols and undertake aggressive code and nuisance abatement efforts to drive out illegal activities.
2. Search for opportunities to locate a medical clinic within the neighborhood. There are medical clinics provided within some MPS schools in the neighborhood, depending upon space availability and a medical provider partnership, as well as clinics outside the neighborhood, but none within the immediate study area. However, a large number of neighborhood residents utilize mass transit and a medical clinic located within the neighborhood to serve local residents would be an opportunity for commercial development.

The redevelopment of the Sears building could incorporate a medical clinic on the second and/or third floors with retail below. The Sears building has access to major transit routes and is centrally located within the neighborhood.

7. Industrial Market Analysis

There are many industrial landowners and tenants in the neighborhood, mainly along the 30th Street Industrial Corridor. The corridor is an historic industrial corridor served by rail and is close to neighborhoods where employees could once walk to work. Functional obsolescence of the buildings, land parcels that do not meet the needs of modern businesses and perception of crime drive the relative demand for and prices of industrial land quite low. On a macroeconomic basis, competition from offshore industries, and newer and more efficient national industries exacerbate the problems facing industrial business owners. Master Lock, for example, is facing serious threats to its continued presence in Milwaukee from manufacturers outside the United States. Tower Automotive must continually squeeze production costs and make its Milwaukee operations competitive with newer ones closer to its major customers. Yet, many businesses are surviving and enjoying modest growth in the neighborhood. Those that survive tend to be smaller manufacturers with relatively newer facilities (e.g. Capitol Stamping).

For any redevelopment to succeed it must address the land assembly and safety issues. Industrial development parallels housing development in that the most successful ones exist in clusters of sufficient size to make the individual firms secure. Major investment is required to assemble and offer industrial land in 3-5 acre increments. Fortunately, considerable land is available in the 30th Street Industrial Corridor.

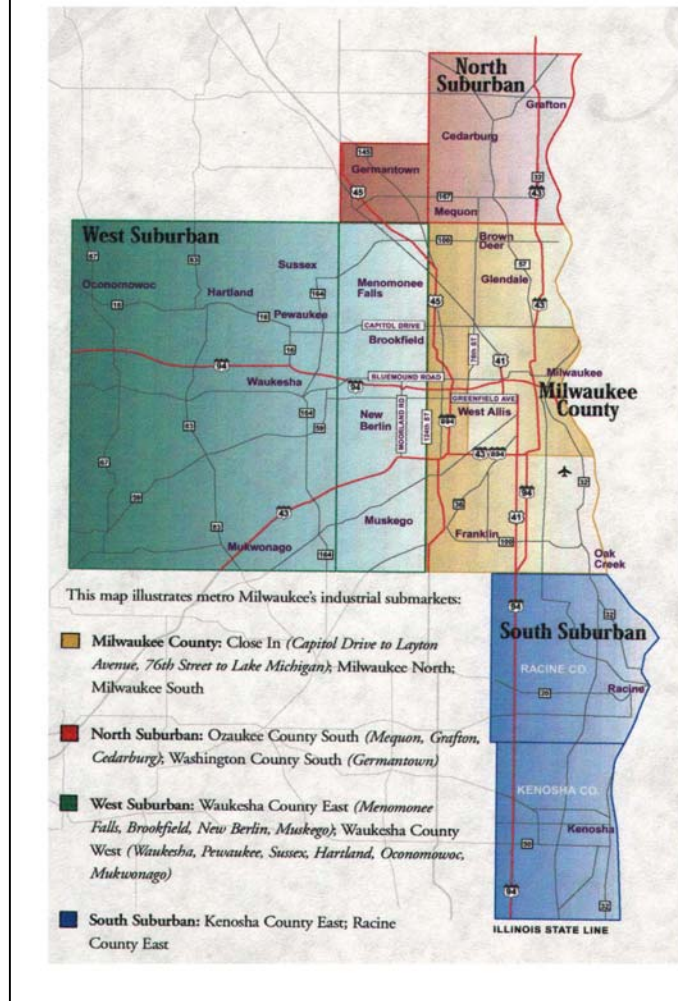
7.1 General Market Characteristics

The neighborhood and area of influence is home to approximately 49 industrial businesses. Most of these businesses are concentrated along the 30th Street rail corridor. Major industries located in the neighborhood include Master Lock, Metal Processing Company, Inc., Capitol Stamping, Bostick (formerly Ato Findley Adhesives) and Steel Products Manufacturing Company. Major business types in the neighborhood include fabricated metal, industrial machinery and equipment, chemicals and allied products and transportation equipment.

According to the 2000 Mooney, LeSage Industrial Market Review, Southeastern Wisconsin's industrial market continues to grow at a rapid pace. Labor shortages with low unemployment rates in the greater Milwaukee metro area make the City of Milwaukee a relatively desirable location for industry. Industries located outside of Milwaukee, such as Ozaukee and Waukesha County, are unable to meet their labor needs. Since the available workforce within the Milwaukee area lacks the necessary transportation to fill those positions, communities and industries have begun busing workers from the City to meet their labor needs. Those industries that locate within the City are able to draw from a large labor pool and an extensive mass transit system to fill their labor needs

Milwaukee County accounts for 54 percent of the industrial market space for the metropolitan Milwaukee area. Map 35 shows the industrial sub markets within the Metro Milwaukee area. The Milwaukee County sub market is broken down into three areas: Milwaukee Close-In, Milwaukee North and Milwaukee South. Milwaukee Close-In, which includes the Fond du Lac and North Neighborhood, has the lowest vacancy rate (5.5 percent) for industrial space compared to 8.4 percent in Milwaukee South and 8.7 percent in Milwaukee North. Lease rates for industrial space in the Milwaukee Close-In area range from \$2.00 to \$4.50 per square foot compared to \$4.00 for the City of Milwaukee. Vacant industrial land sells for approximately \$40,000 per acre. Lease rates in the other areas of Milwaukee County sub market range from \$3.50 to \$4.50 per square foot.

Map 35. Metro Milwaukee Industrial Sub markets



The Fond du Lac and North Neighborhood includes a large section of the 30th Street Industrial Corridor. This corridor extends from Capitol Drive to State Street between 30th and 39th Streets. Currently the neighborhood includes approximately 45 acres of land zoned for industrial or manufacturing use. The neighborhood is served by the Central Pacific rail line but is several blocks away from a major interstate freeway via City streets.

Lease Rates

Table 45 provides a sample of the industrial properties for lease within the neighborhood and surrounding areas.

Table 45. Industrial Space in Neighborhood and Area of Influence

Building / Address	Rental Contact	Total Sq. Ft.	Available Sq. Ft.	Rental Price
Neighborhood				
Wisconsin Industries 2748 N. 32nd Street	Jonas Builders, Inc.	440,000	270,000	\$1.00 n
North Ave Commerce Center 2328-2364 N. 27th St; 2341 N. 25th St.	James T. Barry Co. Inc.	57,000	18,000	\$4.00n
Area of Influence				
Coakley Mayflower 2151 N. King Drive	C.H. Coakley & Co.	470,000	175,000	\$3.00 NNN
Milw Enterprise Ctr - North 2821 N. Fourth Street	Milw Enterprise Ctr-North	192,000	20,000	\$4.50 Mod. Gross
Unnamed 3950 N. Holton Street	Polacheck	50,000	9,400; 3,555	\$3.00-\$4.00 Mod. Gross
4041 N. Richards St.	The Dickman Co.	26,500	26,500	\$3.00 nnn
Coakley Mayflower 2212 N. Fourth Street	C.H. Coakley & Co.	24,000	24,000	\$3.00n
1600 N. 6th St.	The Dickman Co.	23,437	23,437	\$4.50nnn

Source: The Business Journal, Commercial Real Estate Quarterly September 20, 2002

Lease Terms

Net (n): The tenant pays rent and expenses such as taxes, insurance and maintenance on the property or space. Triple-Net (NNN): The tenant pays rent and all operating expenses of the property or space. Gross (g): The landlord pays all property expenses.

Modified Gross: The tenant may pay a portion of the operating expenses.

Sales Prices

Table 46 shows the properties for sale within the neighborhood and the area of influence.

Table 46. Properties for Sale within the Area of Influence

Building / Address	Contact	Total Sq. Ft.	Asking Price
Area of Influence			
Former Midwest Fire Protection 3851 N. Hubbard Ave	Inland Cos. Inc.	30,000	\$275,000 \$9.00/ sq. ft.
102 Capitol Drive 102 W. Capitol Drive	Grubb & Ellis/Boerke Co. Inc.	19,200	\$950,000 \$50.00/ sq. ft.
Downtown Development Site 1407 -1441 N. ML King Drive	James T. Barry Co. Inc.	48,352	Call
Tower Automotive W. Capitol Dr. & N. 35th St.	The Dickman Co. Inc.	3,400,000	\$40,000,000 \$12.00/ sq. ft.

Source: The Business Journal- Commercial real estate Quarterly, September 20,2002.

Inventory of Industrial Businesses

We conducted an inventory of all industrial uses in the area using data provided by the Milwaukee Department of City Development and the 30th Street Industrial Corridor's Inventory of Industries. This data was verified by a windshield survey. Table 47 shows the inventory of businesses in the neighborhood and a comparison of the neighborhood industries to the number of industries located throughout the Metro Milwaukee Area. For industries looking to move into an area, knowing what industries are currently in the neighborhood can help determine suppliers or potential users of a product.

Table 47. Fond du Lac and North Neighborhood Industries

Industry Type	SIC Code	NAICS Code	Neighborhood Industries	Percent of Total	Metro Area	Percent of
					Industries	Total
Construction	15-17	23	3	6.12%	3,805	62.37%
Food & Beverage	20	311-312	1	2.04%	159	2.61%
Fabricated Metals	34	332	11	22.45%	739	12.11%
Industrial Machinery & Equip.	35	333	8	16.33%	491	8.05%
Electronics & Electrical	36	335	3	6.12%	96	1.57%
Transportation Equipment	37	336	4	8.16%	80	1.31%
Instruments & Related Equip.	38	334	0	0.00%	116	1.90%
Printing & Publishing	27	511	6	12.24%	169	2.77%
Lumber & Wood	24	113	1	2.04%	5	0.08%
Primary Metals	33	331	2	4.08%	85	1.39%
Chemicals & Allied Products	28	325	7	14.29%	130	2.13%
Misc Manufacturing	39	339	3	6.12%	226	3.70%
TOTAL			49	100%	6,101	100%

Source: 2000 MSA Business Patterns (NAICS)

Rental rates for industrial property in the neighborhood are compared with other areas within the City of Milwaukee and several newer suburban business parks. Since the new suburban industrial business parks set the standard for the Metro Milwaukee area. Prospective business owners will be comparing how the 30th Street Industrial Corridor compares with these business parks. In order to provide a greater understanding of the competitive business parks seeking industrial businesses (a review was conducted of the Competitive Industrial Parks analysis prepared for the Department of City Development by S.B. Friedman & Company done as part of the Market Analysis of the Havenwoods Area (Appendix E, pp 8-11).

Overall findings in the report included:

- Land prices ranged from \$45,000 to \$100,000 per acre. Most of the lower-priced sales were in the City of Milwaukee Industrial Land Bank.
- Common parcel sizes were 3 to 5 acres. A few users took parcels up to 20 acres.
- Many of the parks had a controlled business environment.
- Absorption of land at the parks ranged from 15 to 35 acres per year.
- Most of the parks had good freeway access and visibility from adjoining roads.

Table 48 shows a comparison of industrial space rental to the Fond du Lac and North neighborhood.

Table 48. Space Rentals-Industrial

Location	Rent Range
Fond du Lac & North	\$1.00-\$4.00gross
City of Milwaukee	\$1.25-\$9.00NNN
Milwaukee County North	\$1.00-\$9.00gross
Milwaukee County South	\$1.00-\$9.00gross
Riverworks	\$2.25-\$3.00gross
Bradley Woods Business Park	3.75gross
Granville Road Business Park	\$4.50-\$9.00NNN
Glendale Business Park	\$3.50-\$4.00n
Cudahy Airport Business Park	\$4.50-\$9.00NNN
Franklin Business Park	\$4.50NNN-\$8.75n

Source: Business Journal Commercial Leasing & Sales Guide
June 15, 2001

Lease Terms

Net (n): The tenant pays rent and expenses such as taxes, insurance and maintenance on the property or space. Triple-Net (NNN): The tenant pays rent and all operating expenses of the property or space. Gross (g): The landlord pays all property expenses.

Modified Gross: The tenant may pay a portion of the operating expenses.

The comparison shows the neighborhood industrial rates tend to be at or near the bottom of the market, but companies are still choosing to locate in other business parks.

The Business Journal Commercial Leasing & Sales Guide for June 2001 showed over 100 listings for industrial space within the City of Milwaukee. The higher rents for industrial space are found within the suburban business parks, such as the Cudahy Airport and Franklin Business Parks.

Industrial businesses serve markets outside their neighborhoods, since location is often more dependent on access to materials, labor or transportation than proximity to markets. Therefore it is reasonable to look at market conditions in the neighborhood to determine if other opportunities exist.

To help analyze this neighborhood's position relative to "the competition," other industrial business clusters were examined to review rents and individual situations to determine:

- a) What facilities type(s) may be attractive to the neighborhood.
- b) Benefits may accrue to the neighborhood if such facilities are attracted.
- c) What features of those facilities must be replicated in order to attract industrial businesses.

Most of the industrial parks in the City of Milwaukee and the greater Milwaukee area have limited available parcels. Two new parks have entered the market since 1998. The Towne of Granville Corporate Park at 107th Street and Brown Deer Road is in the City of Milwaukee. The Westbrook Corporate Center, located west of the Towne of Granville Corporate Park, on Brown Deer Road in Menomonee Falls are two of the most recent industrial parks. An approximately 100 acre industrial park off Moreland Road in the City of New Berlin, immediately to the north of I-43 also entered the market in 1999.

All of the industrial parks had good access to local roads, good to excellent access to freeways, high visibility and design control that resulted in an overall distinctive appearance of the buildings and a definable campus that lets visitors know that they had crossed from the city or village into an industrial park. Land is typically divided into 3 to 5 acre parcels, or multiples thereof, and predominant access is by truck. Marshalling yards and parking lots are sized to permit ease of movement to and from the buildings. Owners and real estate professionals indicated these features were important to the business interests and are highly sought by manufacturers. The 30th Street Industrial Corridor lacks most of these features but has satisfactory access to major transportation routes.

Land prices in the parks ranged from \$45,000 to approximately \$100,000 per acre with an overall average of approximately \$65,000. Suburban business parks, including those in Brookfield, New Berlin and Menomonee Falls, typically had higher prices. Interviews with real estate brokers and professionals knowledgeable about industrial markets indicate that industrial land in the neighborhood would sell for approximately \$40,000 to \$50,000 if developed properly.

Until recently, local real estate brokers and other professionals indicated that absorption levels at many of the new business parks exceeded their expectations. Absorption has slowed considerably in recent months and has all but stopped in the fourth quarter of 2001.

Most industrial parks attract light industrial and warehouse/distribution businesses. Most business in industrial parks outgrew other locations, particularly in the City of Milwaukee. Manufacturers need to move to more functional surroundings, but do not want to leave their labor force behind. This information could be used to support the development of a land bank in the central city that would enable manufacturers to build or move into new plants without leaving the area.

Industrial location is strongly influenced by the opinions and beliefs of the business owners and managers of industrial companies. Workers are, generally, mobile and the surface transportation system permits multiple opportunities to locate a business and still be relatively near markets.

Several owners in the 30th Street Industrial Corridor and other stakeholders in the industrial market were interviewed to gain insight about their first-hand experience of conditions within the industrial corridor as they relate to industrial development. This information is presented in the following sections of the report.

7.2 Sector Assets

The Fond du Lac and North neighborhood has several assets. Perhaps the biggest assets of the area are a supply of workers and relatively low rents.

The neighborhood has satisfactory access to major transportation routes, such as I-94 and I-43, as well as rail service along the 30th Street Industrial Corridor.

The neighborhood is well served by public transportation to bring workers to and from places of employment. According to a study of transportation barriers to employment by the Employment and Training Institute, approximately 60% of inner city residents use a car to travel to work, compared to over 90% in Milwaukee suburbs. The 2000 Census showed that approximately 42% of the occupied housing units within the neighborhood do not have access to a car, therefore, there is a high level of transit use in the neighborhood. Industries locating on or near public transit lines maximize their accessibility to the labor force within the neighborhood.

The neighborhood has an active organization of industrial business owners and representatives. The 30th Street Industrial Corridor Corporation (ICC) has been involved in the retention and attraction of industries to the corridor. The ICC has been involved in the development of a master plan, implementation strategy and strategic plan for the 30th Street Industrial Corridor. Within the study area, the industrial corridor is concentrated primarily between 30th and 32nd Streets from Burleigh to Galena Street. The ICC and the City of Milwaukee have made efforts to determine what types of industries should locate within the study area, the strengths and weaknesses of the areas and ways of addressing

these issues. Industries that locate in the neighborhood that join the ICC have the benefit of a supportive organization in which to address common concerns and issues.

7.3 Sector Weaknesses

There are several significant obstacles to expanding the industrial base in the Fond du Lac and North neighborhood. These obstacles include: perception of crime, functional building stock, the perception of workforce capability and perceived business climate in the city of Milwaukee.

The perception of crime in the neighborhood appears to be worse than the reality. Since 1990, overall crime has decreased by 67% within the neighborhood. However, business owners and real estate professionals interviewed almost unanimously said they continue to see the neighborhood as unsafe for their employees and their property. This perception is based on personal experience with their own properties and evidence of vandalism on neighboring properties. This perception of high crime rates within the neighborhood is perpetuated by the media coverage of crimes within the area. Some owners indicated they would “get out” if they could and several expressed reservations about expanding in the neighborhood.

Existing industrial building stock has good power supplies and telecommunications access, however the industrial building stock in the neighborhood is multi-level, old and inefficient. Industries, today, need building stock that is typically one story, is outfitted for technology and has adequate power supplies to operate equipment.

Businesses also expressed concern about the availability of a capable and reliable labor force. Although the neighborhood offers a large labor pool to draw from, people interviewed indicated that workers lacked the necessary skills to meet employer needs.. The Department of City Development is working on the development of a systematic skill set inventory with the Employment and Training Institute at UW-Milwaukee.

A recent Survey of Job Openings in May of 2000 by the Employment and Training Institute at the University of Wisconsin-Milwaukee indicated there is a high demand for trained workers. 72% of job openings required education, training or occupational experience that went beyond high school. According to the 2000 Census, 44% of the neighborhood residents, 25 years old and older, had not completed high school. This is a structural imbalance that must be addressed to improve the reality and perception of business owners and others who need to be convinced of the viability of locating a business in the neighborhood.

Data collected by the Community Development Block Grant Administration on Neighborhood Plan Areas show that approximately 18% of neighborhood residents have received a high school diploma and 13% of neighborhood residents have received some education beyond high school. Approximately 14% of neighborhood residents have less than a 9th grade education or have received some high school education. See discussion in Appendix 5. Labor Force.

According to a Milwaukee Journal Sentinel article, Milwaukee has the third-worst ranking among the nation's 50 biggest school districts in graduation rates. A study conducted by the Black Alliance for Educational Options showed the graduation rates for Milwaukee were 34% for black students, 42% for Hispanics and 74% for white students. For comparison, the study showed a 40% graduation rate among black students throughout the State of Wisconsin. ("Report Shows Big Chasm in Graduation", November 13, 2001, Milwaukee Journal Sentinel)

The above-mentioned issues of crime and availability of a reliable and capable labor force are beyond most neighborhood plans. Yet, the solution to increasing the supply of well-paying jobs in the neighborhood is dependent upon providing those employers with a safe environment and a reliable and capable workforce.

Another sector weakness we learned about relates to the perceived business climate in the City of Milwaukee. In interviews and conversations, it was not uncommon to hear business owners complain that "City Hall" does not pay enough attention to the needs of the business owners. Many of the comments revolved around the desire (and subsequent failure) of a business to obtain some sort of preferential treatment like dedicated police patrols, grants or deep subsidies for expansion in the neighborhood.

Many business owners are frustrated about inconsistent regulations, confusing requirements and a belief that "nobody at City Hall cares" about them. Concern over regulation was most vocal.

In stakeholder interviews, business owners expressed frustration over the length and difficulty of the permit process required to expand or operate their businesses. It should be noted that most incidents raised by owners occurred prior to creation of the new permit center created by the Milwaukee Department of City Development and the issues may have been addressed. The permit center, operational since January 1, 2000, has greatly expedited the approval process for new development, expansion, remodeling or any other work requiring a building permit. We suspect that most of the business owners in the neighborhood are unaware of the permit center and how it has increased the speed of processing.

Perhaps most serious, however, was a belief that "City Hall" does not care about these businesses. Several owners commented to us that "City Hall" seemed to care only about "downtown, bike paths and parks" rather than businesses. Several mentioned that they "knew" the suburbs would welcome them and that the permit process would be much easier and shorter.

The perception that the business climate is not good appears to be a mix of fact and misperception of the City's efforts. Any effort by the City to reach out to these businesses, tell them what the City has done to attract and retain industrial business, done to make itself more business-friendly, show appreciation for existing business and help solve their problems would be much noticed and greatly appreciated.

7.4 Market Dynamics

Not much rental or purchasing activity is occurring in the neighborhood. According to stakeholder interviews, industrial buildings are perceived as functionally obsolete by the market. Former manufacturing buildings that become available are, in many cases, being used for less intensive purposes like warehousing and cold storage that typically employ few people at low wages. The buildings are under utilized and few people are employed in them.

Other concerns raised during stakeholder interviews and focus group meetings deal with personal and economic security. Persons we spoke to stated emphatically they would have a hard time attracting “reliable and capable” employees due to fear of crime. They also expressed concern for their investment being worth significantly less than book value (cost) due to weak demand.

Recent activity includes the closing of Steeltech Manufacturing at 2700 W. North Avenue and purchase of the property by Capitol Stamping to consolidate their operations in Fredonia and at Richards Street into one facility. Assuming improvements in the economy, over the next few years, Capitol Stamping plans to add approximately 100 employees to their operation. Steeltech is an unusual building because it is a one level manufacturing building with a secure perimeter. Its recent sale out of receivership indicates people will buy in the neighborhood if the right product is available. Steeltech was sold at a loss, however, and its sale indicates a willingness to buy in the neighborhood but not at a price that covers the costs or development. Public subsidies to lower the costs may be necessary to attract buyers.

Perhaps the biggest factor affecting industrial development in the neighborhood concerns the future of Tower Automotive and Master Lock Company. Together these firms have over 4,000,000 square feet of industrial space and employ approximately 2,000 people.

Master Lock is part of the 30th Street Industrial Corridor in the neighborhood and Tower Automotive is in the corridor just outside the neighborhood study boundaries. Both companies are significant providers of high wage jobs for unskilled and semi-skilled workers.

Tower Automotive is looking to move some of their operations outside the State of Wisconsin and has put its land and buildings up for sale on a sale-partial leaseback basis.

Master Lock Company appears to be undergoing similar changes. Price pressures from offshore manufacturers are shrinking sales and employment at the Milwaukee plant. It is unclear at this time if any space will come on the market as a result of changes at Master Lock.

Downsizing of Tower’s and Master Lock’s operations will significantly increase the supply of available industrial buildup and land. The availability of these buildings and large parcels of industrial land does little, in our opinion, to make the neighborhood more

attractive. The buildings do not provide the necessary features in demand for many users other than cold storage or warehousing.

These operations, warehousing and cold storage, provide low wage jobs to the neighborhood. However, the neighborhood's overall disposable income or standard of living cannot improve with low wage jobs. These jobs are a significant source of employment that need to be replaced with better paying jobs.

Despite these strong concerns, stakeholder interviews with brokers and real estate professionals indicated there could be a reasonable demand for industrial land in the neighborhood if it had

- A clean site
- Secure perimeter
- A reasonable price

Industrial real estate professionals indicated that clean sites with secure perimeters at a reasonable price would be needed to attract new industry to the neighborhood.

These requirements initially conflicted with the belief that a need for a capable and reliable workforce was the primary issue in determining demand for industrial land.

Through stakeholder interviews, we learned that many employers would consider moving into the neighborhood if there were sites available that were clean, reasonably priced and had a secure perimeter. The employers would then work on developing a reliable and capable workforce.

7.5 Market Opportunities

According to the Commercial Real Estate Quarterly, which provides listings of properties for sale or lease, there are two opportunities for industrial development in the neighborhood. The two sites include the North Avenue Commerce Center and the Wisconsin Industries site. The Wisconsin Industries offers the greatest opportunity with 270,000 square feet available for development compared with only 18,000 square feet at the North Avenue Commerce Center. Stakeholder interviews emphatically indicated that the area would be much more desirable if business owners had their personal and economic security interests addressed. Employers would find the neighborhood more desirable if they could attract reliable and capable employees to the area without fear for their personal safety and if the investment they made into the site would not lose value. Until these issues are addressed, many potential candidates will avoid the neighborhood for fear their investment will be worth less than they paid for it and for fear they will not get dependable workers. In order to address these concerns, business owners are looking for a clean site, secure perimeter at a reasonable price. The next step to address these concerns would be the development of an industrial campus that ranges from 30 to 50 acres that can be subdivided into 3 to 5 acre parcels.

Existing industrial lands are more than adequate provided that existing buildings are removed and 3 to 5 acre parcels are created. Plans for this sector may be wise to borrow from residential efforts in City Homes and Lindsay Heights where properties, with modern buildings, are clustered.

The available building stock in the neighborhood is being purchased for cold storage. This is certainly a valid use but it provides few jobs and decreases the value of the property from manufacturing. Existing buildings in the neighborhood will probably not be re-used for manufacturing since they are multi-leveled and sometimes awkward floor plans. They are not the 3 to 5 acres preferred by the market and do not have the “campus” identity typically demanded by manufacturers. Any attempt to redevelop this area for modern manufacturing will almost certainly require assembly of land, demolition of obsolete buildings and replatting the land into a definable business “park”. In other words, any attempt at industrial redevelopment will require clearing the land and starting over.

Recommended Actions for Industrial

1. Support efforts to reduce crime. A neighborhood that is perceived as being safe and is safe will help to attract new industrial development and retain existing businesses. Many of the existing businesses state that crime is their primary concern. Increase crime patrols and undertake aggressive code and nuisance abatement efforts to drive out illegal activity.
2. Contact and call upon business owners to let them know they are important to the City. In order to help retain the existing businesses that have made a commitment to the neighborhood, the City should make efforts to show local businesses what they have done to be more business-friendly and dispel notions that the City does not care. Efforts to listen to the concerns of Corridor business owners and to help solve their problems would be greatly appreciated and would reverse the misconceptions that businesses have about the City of Milwaukee.
3. Look for opportunities to assemble land and create an industrial “park”. The success of City Homes and Lindsay Heights has shown that cluster development is attractive to new homeowners. This is true of business owners. An industrial cluster development, or “park”, would provide an opportunity for businesses to address issues as a single entity in one location. We recognize this is a major undertaking and expense but the alternative is to let the land decline in use from manufacturing to warehouse to vacant.

Appendix 1

Tables 49 through 52 represent the average ridership for the bus routes serving the neighborhood. This data was obtained from the Milwaukee County Transit System during 2000 and 2001. These numbers represent not only those residents that utilize public transit, but also those individuals that use these routes to travel to work or other areas of the City and pass through the neighborhood. Bus stops with high ridership numbers may represent opportunities for additional development.

Table 49. Ridership by Stop for Route 1 and Route 12

		Southbound ON		Southbound OFF		Northbound ON		Northbound OFF		
ROUTE 1	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 1
Fond du Lac	Burleigh	11.2%	149	19.7%	256	20.2%	269	8.5%	111	Passengers ON
Fond du Lac	32nd	1.7%	22	2.8%	37	6.8%	91	4.6%	60	1332
Fond du Lac	27th	10.8%	144	21.8%	284	25.4%	338	9.6%	125	Passengers OFF
Fond du Lac	North	7.1%	94	12.3%	160	9.8%	131	6.8%	89	1301
Fond du Lac	17th	1.0%	13	3.7%	48	1.7%	22	2.3%	30	Average
Fond du Lac	Walnut	0.3%	4	5.9%	77	4.1%	55	1.8%	24	Total Rides
		32.0%	426	66.3%	862	68.0%	906	33.7%	439	1316.5
		Southbound ON		Southbound OFF		Northbound ON		Northbound OFF		
ROUTE 12	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 12
Teutonia	Burleigh	3.6%	69	4.4%	80	7.8%	150	5.0%	90	Passengers ON
Teutonia	Chambers	4.9%	94	5.5%	100	3.4%	65	4.6%	83	1920
Teutonia	Locust	3.6%	70	3.9%	71	4.9%	94	6.0%	109	Passengers OFF
Teutonia	Hadley	1.8%	35	1.3%	23	1.3%	24	2.1%	38	1817
Teutonia	Center	12.2%	235	11.1%	202	12.8%	245	11.0%	199	
Teutonia	Clarke	2.3%	44	1.0%	19	0.8%	16	2.2%	40	
Teutonia	Wright	1.9%	37	1.1%	20	1.0%	19	2.7%	49	
Teutonia	Meinecke	1.0%	19	1.4%	25	1.1%	22	0.9%	16	
Teutonia	North	7.0%	135	12.5%	227	11.1%	214	6.8%	124	
12th	Lloyd	0.8%	15	0.5%	9	0.8%	16	0.8%	15	
12th	Reservior	0.9%	18	0.9%	17	1.0%	20	1.3%	24	
12th	Vine	2.4%	46	1.6%	29	0.9%	17	1.4%	25	Average
12th	Walnut	4.0%	77	6.9%	126	6.5%	124	3.1%	57	Total Rides
		46.6%	894	52.2%	948	53.4%	1026	47.8%	869	1868.5

Table 50. Ridership by Stop for Route 21 and Route 22

ROUTE 21	STOPS	Eastbound ON		Eastbound OFF		Westbound ON		Westbound OFF		ROUTE 21
		Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	
North	35th	8.8%	192	4.6%	101	4.1%	90	9.0%	197	Passengers ON
North	33rd	1.7%	38	1.7%	37	1.0%	22	2.2%	48	2183
North	31st	1.3%	29	0.9%	19	0.3%	7	1.4%	31	Passengers OFF
North	29th	0.7%	15	1.2%	26	1.0%	22	1.3%	28	2189
North	27th	9.6%	209	7.2%	158	9.6%	210	8.4%	183	
North	25th	1.4%	30	1.6%	35	0.4%	9	0.9%	20	
North	24th	1.0%	22	1.3%	29	1.4%	31	1.1%	25	
North	23rd	0.6%	14	0.9%	20	2.0%	43	1.1%	25	
North	Fond du Lac	13.2%	289	6.9%	150	7.2%	158	10.5%	230	
North	Monroe	1.0%	22	1.1%	23	0.7%	16	1.5%	33	
North	18th	1.6%	35	1.4%	30	1.2%	26	1.1%	25	
North	16th	3.6%	78	4.6%	101	3.3%	73	3.5%	77	
North	14th	1.4%	31	0.9%	20	1.0%	21	1.6%	36	
North	Teutonia	4.4%	96	9.6%	210	8.7%	191	4.6%	101	
North	12th	0.9%	19	1.0%	22	1.1%	24	1.0%	21	Average
North	10th	1.4%	30	3.7%	82	4.2%	91	2.1%	46	Total Rides
		52.6%	1149	48.7%	1063	47.4%	1034	51.4%	1126	2186
ROUTE 22	STOPS	Eastbound ON		Eastbound OFF		Westbound ON		Westbound OFF		ROUTE 22
		Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	
Center	35th	11.25%	253	2.34%	54	3.02%	68	8.91%	206	Passengers ON
Center	32nd	1.20%	27	0.26%	6	0.58%	13	0.87%	20	2248
Center	30th	0.36%	8	0.30%	7	0.18%	4	0.26%	6	Passengers OFF
Center	29th					0.98%	22	0.69%	16	2311
Center	Fond du Lac	11.12%	250	9.61%	222	6.63%	149	5.63%	130	
Center	Monroe	7.34%	165	1.21%	28	1.25%	28	12.42%	287	
Center	25th	1.29%	29	1.51%	35	0.89%	20	1.47%	34	
Center	24th	2.80%	63	1.51%	35	1.51%	34	1.56%	36	
Center	22nd	2.40%	54	2.12%	49	1.69%	38	2.68%	62	
Center	20th	3.25%	73	2.47%	57	2.54%	57	2.73%	63	
Center	17th	1.78%	40	1.99%	46	1.33%	30	1.86%	43	
Center	15th	0.85%	19	1.38%	32	1.42%	32	1.21%	28	
Center	Teutonia	6.45%	145	9.69%	224	11.08%	249	6.40%	148	
Center	12th	1.07%	24	1.90%	44	2.40%	54	1.21%	28	
Center	11th					4.05%	91	0.30%	7	
Center	10th	2.49%	56	6.79%	157	2.14%	48	2.42%	56	Average
Center	8th	1.02%	23	3.72%	86	3.65%	82	2.55%	59	Total Rides
		54.67%	1229	46.82%	1082	45.33%	1019	53.18%	1229	2279.5

Table 51. Ridership by Stop for Route 23 and Route 27

		Southbound ON		Southbound OFF		Northbound ON		Northbound OFF			
ROUTE 23	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 23	
Fond du Lac	Burleigh	9.55%	153	16.07%	254	17.98%	288	9.42%	149	Passengers ON	
Fond du Lac	34th	0.19%	3	0.19%	3	0.19%	3	0.82%	13		1602
Fond du Lac	32nd	1.44%	23	2.97%	47	1.62%	26	0.89%	14	Passengers OFF	
Fond du Lac	Locust	0.06%	1	0.13%	2	0.25%	4	0.95%	15		1581
Fond du Lac	Hadley	0.44%	7	1.20%	19	1.56%	25	0.95%	15		
Fond du Lac	29th	0.31%	5	0.70%	11						
Fond du Lac	28th					2.31%	37	1.20%	19		
Fond du Lac	Center	2.50%	40	10.31%	163						
Fond du Lac	27th	8.36%	134	4.17%	66	15.11%	242	11.64%	184		
Fond du Lac	Tamarack	1.25%	20	1.08%	17	0.69%	11	0.89%	14		
Fond du Lac	Cypress	0.81%	13	0.70%	11						
Fond du Lac	Wright					1.44%	23	1.27%	20		
Fond du Lac	Oak	2.12%	34	3.80%	60						
Fond du Lac	Meinecke					2.75%	44	2.47%	39		
Fond du Lac	N. 2150	0.12%	2	0.57%	9	0.94%	15	1.33%	21		
Fond du Lac	North	5.68%	91	6.64%	105	8.55%	137	4.68%	74		
Fond du Lac	20th	0.50%	8	0.44%	7	0.37%	6	1.08%	17		
Fond du Lac	19th	0.19%	3	0.38%	6	0.31%	5	1.52%	24		
Fond du Lac	17th	1.50%	24	1.20%	19	0.69%	11	0.57%	9		
17th	N. 1942	0.25%	4	0.38%	6	1.06%	17	0.95%	15		
17th	Vine	0.87%	14	1.52%	24	1.94%	31	1.33%	21	Average	
17th	Walnut	3.43%	55	2.59%	41	2.68%	43	3.04%	48	Total Rides	
		39.58%	634	55.03%	870	60.42%	968	44.97%	711		1591.5
		Northbound ON		Northbound OFF		Southbound ON		Southbound OFF			
ROUTE 27	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % On	Number	ROUTE 27	
27th	Galena	1.21%	33	1.68%	49	1.24%	34	1.65%	48	Passengers ON	
27th	Lisbon	5.34%	146	6.38%	186	6.10%	167	3.09%	90		2736
27th	Vine	0.95%	26	1.68%	49	1.39%	38	1.65%	48	Passengers OFF	
27th	Brown	0.66%	18	2.23%	65	1.43%	39	1.68%	49		2916
27th	Llyod	0.69%	19	1.65%	48	2.16%	59	1.23%	36		
27th	North	7.64%	209	10.84%	316	10.01%	274	7.03%	205		
27th	Meinecke	1.10%	30	1.41%	41	0.77%	21	0.75%	22		
27th	Wright	1.24%	34	2.57%	75	2.67%	73	1.30%	38		
27th	Medford	0.18%	5	1.20%	35						
27th	Clarke					3.40%	93	1.10%	32		
27th	Fond du Lac	3.03%	83	11.80%	344	15.10%	413	9.36%	273		
27th	Center	7.49%	205	6.07%	177						
27th	Hadley	1.90%	52	1.92%	56	2.16%	59	0.99%	29		
27th	Locust	1.72%	47	2.98%	87	2.38%	65	1.10%	32		
27th	Chambers	0.69%	19	2.09%	61	1.50%	41	1.13%	33	Average	
27th	Burleigh	5.52%	151	9.33%	272	10.34%	283	4.12%	120	Total Rides	
		39.36%	1077	63.82%	1861	60.64%	1659	36.18%	1055		2826

Table 52. Ridership by Stop for Routes 35, 57 and 60.

		Southbound ON		Southbound OFF		Northbound ON		Northbound OFF		
ROUTE 35	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 35
35th	Burleigh	5.14%	85	2.90%	49					Passengers ON
35th	Fond du Lac	17.46%	289	1.24%	21	3.81%	63	19.78%	334	1655
35th	Chambers	0.66%	11	0.36%	6					Passengers OFF
35th	Locust	2.30%	38	0.71%	12	1.15%	19	1.95%	33	1689
35th	Hadley	1.63%	27	1.30%	22	0.54%	9	1.12%	19	
35th	Center	8.94%	148	3.91%	66	4.23%	70	10.48%	177	
35th	Clarke	4.29%	71	2.01%	34	1.27%	21	2.37%	40	
35th	Wright	4.05%	67	2.37%	40	1.63%	27	4.80%	81	
35th	Meinecke	1.39%	23	0.83%	14	1.09%	18	1.36%	23	
35th	North	4.89%	81	6.69%	113	5.44%	90	6.04%	102	
35th	Garfield	2.90%	48	1.66%	28	1.75%	29	2.43%	41	
35th	Lloyd	1.87%	31	1.30%	22	1.75%	29	1.72%	29	
35th	Brown	1.33%	22	3.91%	66	2.48%	41	2.43%	41	
35th	Lisbon	6.04%	100	4.20%	71	5.74%	95	5.57%	94	Average
35th	Galena	2.54%	42	2.96%	50	3.69%	61	3.61%	61	Total Rides
		65.44%	1083	36.35%	614	34.56%	572	63.65%	1075	1672
		Eastbound ON		Eastbound OFF		Westbound ON		Westbound OFF		
ROUTE 57	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 57
Lisbon	35th	9.38%	98	5.67%	57	0.058373206	61	9.24%	93	Passengers ON
Lisbon	33rd	4.11%	43	0.60%	6	1.15%	12	2.88%	29	1045
Lisbon	31st	2.68%	28	1.39%	14	2.30%	24	2.78%	28	Passengers OFF
Lisbon	29th	2.30%	24	1.49%	15	1.72%	18	2.58%	26	1006
Lisbon	27th	9.09%	95	8.85%	89	9.86%	103	7.06%	71	
Lisbon	25th	3.06%	32	1.19%	12	1.05%	11	2.68%	27	
Lisbon	24th	1.53%	16	2.98%	30	2.87%	30	4.17%	42	
Lisbon	22nd	2.39%	25	3.28%	33	2.11%	22	3.28%	33	
Walnut	20th	10.43%	109	3.28%	33	4.31%	45	8.35%	84	
Walnut	18th	0.48%	5	1.09%	11	0.96%	10	0.99%	10	
Walnut	17th	4.40%	46	5.47%	55	5.55%	58	4.57%	46	
Walnut	15th	0.38%	4	0.80%	8	0.29%	3	0.30%	3	
Walnut	14th	0.10%	1	0.10%	1	0.67%	7	1.19%	12	Average
Walnut	12th	3.35%	35	7.85%	79	7.66%	80	5.86%	59	Total Rides
		53.68%	561	44.04%	443	46.32%	484	55.96%	563	1025.5
		Eastbound ON		Eastbound OFF		Westbound ON		Westbound OFF		
ROUTE 60	STOPS	Total % On	Number	Total % Off	Number	Total % On	Number	Total % Off	Number	ROUTE 60
Burleigh	35th	17.59%	355	7.53%	153	8.42%	170	19.94%	405	Passengers ON
Burleigh	33rd	1.19%	24	0.39%	8	0.59%	12	1.23%	25	2018
Burleigh	30th	1.04%	21	1.18%	24	1.44%	29	1.38%	28	Passengers OFF
Burleigh	27th	8.72%	176	9.21%	187	10.56%	213	7.78%	158	2031
Burleigh	25th	1.73%	35	1.82%	37	1.59%	32	1.97%	40	
Burleigh	24th	3.32%	67	2.12%	43	3.27%	66	3.45%	70	
Burleigh	22nd	0.84%	17	2.66%	54	2.48%	50	0.84%	17	
Burleigh	20th	1.24%	25	2.46%	50	3.42%	69	1.62%	33	
Hopkins	Chambers	1.68%	34	4.23%	86	1.93%	39	2.90%	59	
Chambers	Teutonia	0.20%	4	2.12%	43	4.01%	81	2.07%	42	
Teutonia	Burleigh	3.42%	69	4.04%	82	2.68%	54	2.17%	44	
Burleigh	14th	1.98%	40	1.72%	35	1.59%	32	1.72%	35	
Burleigh	12th	2.08%	42	3.05%	62	3.37%	68	2.61%	53	
Burleigh	10th	0.89%	18	2.95%	60	4.11%	83	1.92%	39	Average
Burleigh	8th	1.78%	36	2.07%	42	2.82%	57	0.84%	17	Total Rides
		47.72%	963	47.56%	966	52.28%	1055	52.44%	1065	2024.5
										All Routes: Total Avg ON
										16,739
										All Routes: Total Avg OFF
										16,841
										All Routes: Avg Total Rides
										16,790

Appendix 2.

Assessment values were obtained for the neighborhood by Census tract and then compared to the average assessment value for the City of Milwaukee. The comparison is shown in Table 53. Assessment values for single-family homes and duplexes for the neighborhood range from 16% to 50% of the City's average assessment value. Census tracts in the northwestern section of the neighborhood have higher assessment values, as do the Census tracts with the City Homes and Lindsay Heights developments.

Table 53. Assessment Values by Census Tract

Census Tract	Average Single-Family Assessed Value	% of City Value	Average Duplex Assessed Value	% of City Value	Total Average Assessed Value	% of City Value
48	\$ 44,915	59.1%	\$ 51,544	81.0%	\$ 48,197	65.6%
62	\$ 41,628	54.8%	\$ 39,512	62.1%	\$ 38,124	51.9%
63	\$ 31,295	41.2%	\$ 33,087	52.0%	\$ 35,398	48.2%
64	\$ 21,017	27.7%	\$ 25,288	39.8%	\$ 20,735	28.2%
65	\$ 30,838	40.6%	\$ 33,182	52.2%	\$ 28,900	39.3%
66	\$ 18,809	24.7%	\$ 20,389	32.1%	\$ 17,193	23.4%
84	\$ 14,970	19.7%	\$ 20,451	32.2%	\$ 14,178	19.3%
85	\$ 14,837	19.5%	\$ 21,806	34.3%	\$ 17,423	23.7%
86	\$ 16,794	22.1%	\$ 23,862	37.5%	\$ 15,759	21.4%
87	\$ 16,755	22.0%	\$ 23,317	36.7%	\$ 16,224	22.1%
88	\$ 17,367	22.9%	\$ 23,710	37.3%	\$ 18,010	24.5%
89	\$ 21,586	28.4%	\$ 23,750	37.3%	\$ 29,281	39.8%
90	\$ 31,913	42.0%	\$ 33,163	52.1%	\$ 30,127	41.0%
96	\$ 31,804	41.8%	\$ 32,720	51.4%	\$ 27,565	37.5%
97	\$ 25,955	34.2%	\$ 21,418	33.7%	\$ 18,370	25.0%
98	\$ 30,713	40.4%	\$ 23,169	36.4%	\$ 21,346	29.0%
99	\$ 15,572	20.5%	\$ 18,904	29.7%	\$ 23,494	32.0%
100	\$ 12,528	16.5%	\$ 17,881	28.1%	\$ 18,268	24.9%
101	\$ 15,586	20.5%	\$ 21,105	33.2%	\$ 16,601	22.6%
102	\$ 17,563	23.1%	\$ 21,202	33.3%	\$ 16,742	22.8%
103	\$ 26,010	34.2%	\$ 41,126	64.7%	\$ 29,526	40.2%
117	\$ 12,022	15.8%	\$ 15,306	24.1%	\$ 18,570	25.3%
118	\$ 12,784	16.8%	\$ 20,706	32.6%	\$ 10,241	13.9%
119	\$ 49,208	64.7%	\$ 20,256	31.8%	\$ 40,284	54.8%
120	\$ 19,514	25.7%	\$ 18,614	29.3%	\$ 15,358	20.9%
121	\$ 17,364	22.8%	\$ 30,001	47.2%	\$ 21,292	29.0%
122	\$ 46,588	61.3%	\$ 36,709	57.7%	\$ 38,882	52.9%
138	\$ 21,829	28.7%	\$ 25,490	40.1%	\$ 34,649	47.1%
139	\$ 42,228	55.6%	\$ 26,600	41.8%	\$ 40,194	54.7%
140	\$ 34,294	45.1%	\$ 21,157	33.3%	\$ 25,473	34.7%
Neighborhood	\$ 28,341	37.3%	\$ 28,775	45.2%	\$ 28,577	38.9%
City of Milwaukee	\$ 76,000		\$ 63,600		\$ 73,500	

Source: City of Milwaukee, Department of City Development, 2002 Assessments

Table 54. shows the distribution of single-family homes and duplexes by Census tract as a percentage of the distribution of these homes throughout the City. The Fond du Lac and North neighborhood has a larger concentration of duplexes compared to the overall number of duplexes in the City. In general, the neighborhood has 30% to 50% of the City's single-family homes. The Census tracts with higher concentrations of single-family homes are located along the northwestern corner of the neighborhood, as well as those Census tracts that contain the Lindsay Heights and City Homes developments.

Table 54. Distribution of Single-Family Homes and Duplexes by Census Tract

Census Tract	Total Parcels	Total Single Family Parcels	% of City Average	Total Duplex Parcels	% of City Average
48	1166	579	70.30%	446	136.35%
62	721	269	52.82%	366	180.96%
63	840	323	54.44%	344	145.98%
64	769	293	53.94%	341	158.07%
65	807	336	58.94%	327	144.44%
66	1051	365	49.17%	445	150.93%
84	465	151	45.97%	173	132.62%
85	458	126	38.95%	171	133.09%
86	496	141	40.24%	204	146.61%
87	501	168	47.47%	191	135.90%
88	688	174	35.80%	292	151.29%
89	508	118	32.88%	219	153.68%
90	691	128	26.22%	350	180.56%
96	664	157	33.47%	327	175.55%
97	548	128	33.07%	174	113.19%
98	481	112	32.96%	161	119.32%
99	566	151	37.77%	170	107.07%
100	360	101	39.72%	95	94.07%
101	334	69	29.25%	122	130.21%
102	352	67	26.95%	100	101.27%
103	286	69	34.16%	88	109.68%
117	145	27	26.36%	18	22.44%
118	260	68	37.03%	66	90.49%
119	251	146	82.35%	48	68.17%
120	274	80	41.33%	83	107.98%
121	224	59	37.29%	84	133.68%
122	598	170	40.25%	248	147.83%
138	210	63	42.47%	78	132.40%
139	144	130	127.81%	5	12.38%
140	200	50	35.39%	28	49.91%
Neighborhood	15,058	4,818	32.00%	5,764	38.28%
City of Milwaukee	123,414	87,175	70.64%	34,621	28.05%

Source: City of Milwaukee, Department of City Development, 2002

Appendix 3.

Retail demand for the neighborhood was determined for twelve basic retail categories. These categories include: apparel and accessories; auto dealers; auto & home supply; drug & proprietary; eating and drinking places; food stores; furniture and furnishings; appliance, TV and radio; gas stations; general merchandise and department stores. Expenditures, and total expenditures, for each retail category were obtained from Claritas, a marketing firm, for a one-mile and three-mile radius around the intersection of Fond du Lac and North Avenue. The expenditure data was used to determine the ratio between retail category expenditures and total expenditures. The total trade area income for the one-mile radius is multiplied by the ratio to determine the demand for each retail category. Total trade area income was calculated using \$19,714 as the average household income and multiplying by the 7,836 households in the one-mile radius area and \$27,388 household income and 74,478 households within the three-mile radius.

The tables 55 and 56 below show the retail demand for the one-mile and three-mile radius using the above calculations.

Table 55. One-Mile Radius Market Demand

Category	Expenditure	Total Expenditures	Ratio	Total Trade Area Income	Demand
Apparel & Accessories	7,700,000	168,700,000	0.046	\$154,478,904.00	\$7,050,904.33
Auto Dealers	35,900,000	168,700,000	0.213	\$154,478,904.00	\$32,873,696.82
Auto & Home Supply	1,700,000	168,700,000	0.010	\$154,478,904.00	\$1,556,693.16
Drug & Proprietary	8,800,000	168,700,000	0.052	\$154,478,904.00	\$8,058,176.38
Eating & Drinking Places	17,600,000	168,700,000	0.104	\$154,478,904.00	\$16,116,352.76
Food Stores	25,200,000	168,700,000	0.149	\$154,478,904.00	\$23,075,686.90
Furniture/Furnishings	5,500,000	168,700,000	0.033	\$154,478,904.00	\$5,036,360.24
Appliance, Radio & TV	8,100,000	168,700,000	0.048	\$154,478,904.00	\$7,417,185.08
Gas Stations	8,600,000	168,700,000	0.051	\$154,478,904.00	\$7,875,036.01
General Merchandise	21,800,000	168,700,000	0.129	\$154,478,904.00	\$19,962,300.58
Hardware, Lumber & Garden	10,000,000	168,700,000	0.059	\$154,478,904.00	\$9,157,018.61
Department Stores	19,900,000	168,700,000	0.118	\$154,478,904.00	\$18,222,467.04

1999- Claritas and AGS, Inc.

Table 56. Three-Mile Radius Market Demand

Category	Expenditure	Total Expenditures	Ratio	Total Trade Area Income	Demand
Apparel & Accessories	81,100,000	1,753,800,000	0.046	\$2,039,803,464.00	\$94,325,499.45
Auto Dealers	379,700,000	1,753,800,000	0.217	\$2,039,803,464.00	\$441,620,125.03
Auto & Home Supply	17,500,000	1,753,800,000	0.010	\$2,039,803,464.00	\$20,353,837.74
Drug & Proprietary	91,700,000	1,753,800,000	0.052	\$2,039,803,464.00	\$106,654,109.73
Eating & Drinking Places	182,400,000	1,753,800,000	0.104	\$2,039,803,464.00	\$212,145,143.02
Food Stores	260,700,000	1,753,800,000	0.149	\$2,039,803,464.00	\$303,214,028.43
Furniture/Furnishings	57,900,000	1,753,800,000	0.033	\$2,039,803,464.00	\$67,342,125.99
Appliance, Radio & TV	84,600,000	1,753,800,000	0.048	\$2,039,803,464.00	\$98,396,266.99
Gas Stations	88,900,000	1,753,800,000	0.051	\$2,039,803,464.00	\$103,397,495.69
General Merchandise	225,700,000	1,753,800,000	0.129	\$2,039,803,464.00	\$262,506,352.96
Hardware, Lumber & Garden	104,400,000	1,753,800,000	0.060	\$2,039,803,464.00	\$121,425,180.55
Department Stores	206,200,000	1,753,800,000	0.118	\$2,039,803,464.00	\$239,826,362.34

1999- Claritas and AGS, Inc.

Claritas also provides the number of stores in the neighborhood. The 1997 Economic Census is used to estimate sales data for stores in the retail categories using sales data from Milwaukee County. (The next Economic Census will be conducted in 2002.) The average sales per store is calculated by dividing the Milwaukee County Sales data by the number of stores in Milwaukee County. The average sales per store is multiplied by the number of stores within the one-mile and three-mile radius to determine total supply in the area. The values are then adjusted to 1999.

The tables 57 and 58 below show the retail supply for the one-mile and three-mile radius using the above calculations.

Table 57. One-Mile Radius Retail Supply

Category	# of Stores in Trade Area	Sales Milw County	# of Stores Milw County	Supply	Adjusted Supply	Sales per Store
Apparel & Accessories	5	396,981,000	516	\$ 3,846,715.12	\$ 3,990,368.38	\$ 798,073.68
Auto Dealers	0	1,952,693,000	158	\$ -	\$ -	\$ -
Auto & Home Supply	2	148,461,000	156	\$ 1,903,346.15	\$ 1,974,425.47	\$ 987,212.74
Drug & Proprietary	1	556,502,000	277	\$ 2,009,032.49	\$ 2,084,058.60	\$ 2,084,058.60
Eating & Drinking Places	12	865,055,000	1767	\$ 5,874,736.84	\$ 6,094,125.35	\$ 507,843.78
Food Stores	22	1,450,111,000	503	\$ 63,424,337.97	\$ 65,792,881.71	\$ 2,990,585.53
Furniture/Furnishings	1	309,104,000	192	\$ 1,609,916.67	\$ 1,670,038.04	\$ 1,670,038.04
Appliance, Radio & TV	5	269,366,000	124	\$ 10,861,532.26	\$ 11,267,149.65	\$ 2,253,429.93
Gas Stations	5	530,963,000	306	\$ 8,675,866.01	\$ 8,999,861.01	\$ 1,799,972.20
General Merchandise	1	29,198,000	13	\$ 2,246,000.00	\$ 2,329,875.52	\$ 2,329,875.52
Hardware, Lumber & Garden	1	665,488,000	220	\$ 3,024,945.45	\$ 3,137,910.22	\$ 3,137,910.22
Department Stores	0	902,472,000	38	\$ -	\$ -	\$0.00

1997-Economic Census

Sales data was obtained from 1997 Economic Census, adjusted to 1999

Table 58. Three-Mile Radius Retail Supply

Category	# of Stores in Trade Area	Sales Milw County	# of Stores Milw County	Supply	Adjusted Supply	Sales per Store
Apparel & Accessories	53	\$ 396,981,000	516	\$ 40,775,180.23	\$ 42,297,904.81	\$ 798,073.68
Auto Dealers	7	\$ 1,952,693,000	158	\$ 86,511,715.19	\$ 89,742,443.14	\$ 12,820,349.02
Auto & Home Supply	16	\$ 148,461,000	156	\$ 15,226,769.23	\$ 15,795,403.77	\$ 987,212.74
Drug & Proprietary	24	\$ 556,502,000	277	\$ 48,216,779.78	\$ 50,017,406.41	\$ 2,084,058.60
Eating & Drinking Places	292	\$ 865,055,000	1767	\$ 142,951,929.82	\$ 148,290,383.64	\$ 507,843.78
Food Stores	154	\$ 1,450,111,000	503	\$ 443,970,365.81	\$ 460,550,172.00	\$ 2,990,585.53
Furniture/Furnishings	25	\$ 309,104,000	192	\$ 40,247,916.67	\$ 41,750,950.90	\$ 1,670,038.04
Appliance, Radio & TV	15	\$ 269,366,000	124	\$ 32,584,596.77	\$ 33,801,448.94	\$ 2,253,429.93
Gas Stations	37	\$ 530,963,000	306	\$ 64,201,408.50	\$ 66,598,971.47	\$ 1,799,972.20
General Merchandise	3	\$ 29,198,000	13	\$ 6,738,000.00	\$ 6,989,626.56	\$ 2,329,875.52
Hardware, Lumber & Garden	8	\$ 665,488,000	220	\$ 24,199,563.64	\$ 25,103,281.78	\$ 3,137,910.22
Department Stores	1	\$ 902,472,000	38	\$ 23,749,263.16	\$ 24,636,165.10	\$ 24,636,165.10

1997-Economic Census

Sales data was obtained from 1997 Economic Census, adjusted to 1999

The shortfall is calculated by subtracting the retail demand by the retail supply in the neighborhood. The shortfall helps determine which retail categories are lacking in the neighborhood. The shortfall is divided by the average sales per store to get an estimated number of stores that can be supported in the neighborhood. A positive number indicates that the neighborhood has a sufficient supply of retail to meet the area's demand. A negative number indicates that the neighborhood does not have an adequate supply of retail to meet the area's demand.

The tables 59 and 60 below show the retail shortfall for the one-mile and three-mile radius using the above calculations.

Table 59. One-Mile Retail Shortfall

	Adjusted Supply	Demand	Shortfall	Sales per Store	Possible Stores
Apparel & Accessories	\$ 3,990,368.38	\$ 7,050,904.33	\$ 3,060,535.95	\$ 798,073.68	3.83
Auto Dealers*	\$ -	\$ 32,873,696.82	\$ 32,873,696.82	\$ 12,358,816.46	2.66
Auto & Home Supply	\$ 1,974,425.47	\$ 1,556,693.16	\$ (417,732.31)	\$ 987,212.74	-0.42
Drug & Proprietary	\$ 2,084,058.60	\$ 8,058,176.38	\$ 5,974,117.78	\$ 2,084,058.60	2.87
Eating & Drinking Places	\$ 6,094,125.35	\$ 16,116,352.76	\$ 10,022,227.40	\$ 507,843.78	19.73
Food Stores	\$ 65,792,881.71	\$ 23,075,686.90	\$ (42,717,194.81)	\$ 2,990,585.53	-14.28
Furniture/Furnishings	\$ 1,670,038.04	\$ 5,036,360.24	\$ 3,366,322.20	\$ 1,670,038.04	2.02
Appliance, Radio & TV	\$ 11,267,149.65	\$ 7,417,185.08	\$ (3,849,964.57)	\$ 2,253,429.93	-1.71
Gas Stations	\$ 8,999,861.01	\$ 7,875,036.01	\$ (1,124,825.00)	\$ 1,799,972.20	-0.62
General Merchandise	\$ 2,329,875.52	\$ 19,962,300.58	\$ 17,632,425.06	\$ 2,329,875.52	7.57
Hardware, Lumber & Garden	\$ 3,137,910.22	\$ 9,157,018.61	\$ 6,019,108.39	\$ 3,137,910.22	1.92
Department Stores*	\$ -	\$ 18,222,467.04	\$ 18,222,467.04	\$ 23,749,263.16	0.77

* Sales per Store based on County Sales

Table 60. Three-Mile Retail Shortfall

	Adjusted Supply	Demand	Shortfall	Sales Per Store	Possible Stores
Apparel & Accessories	\$ 42,297,904.81	\$ 94,325,499.45	\$ 52,027,594.64	\$ 798,073.68	65.19
Auto Dealers*	\$ 89,742,443.14	\$ 441,620,125.03	\$ 351,877,681.89	\$ 12,820,349.02	27.45
Auto & Home Supply	\$ 15,795,403.77	\$ 20,353,837.74	\$ 4,558,433.97	\$ 987,212.74	4.62
Drug & Proprietary	\$ 50,017,406.41	\$ 106,654,109.73	\$ 56,636,703.32	\$ 2,084,058.60	27.18
Eating & Drinking Places	\$ 148,290,383.64	\$ 212,145,143.02	\$ 63,854,759.39	\$ 507,843.78	125.74
Food Stores	\$ 460,550,172.00	\$ 303,214,028.43	\$ (157,336,143.56)	\$ 2,990,585.53	-52.61
Furniture/Furnishings	\$ 41,750,950.90	\$ 67,342,125.99	\$ 25,591,175.09	\$ 1,670,038.04	15.32
Appliance, Radio & TV	\$ 33,801,448.94	\$ 98,396,266.99	\$ 64,594,818.06	\$ 2,253,429.93	28.67
Gas Stations	\$ 66,598,971.47	\$ 103,397,495.69	\$ 36,798,524.23	\$ 1,799,972.20	20.44
General Merchandise	\$ 6,989,626.56	\$ 262,506,352.96	\$ 255,516,726.41	\$ 2,329,875.52	109.67
Hardware, Lumber & Garden	\$ 25,103,281.78	\$ 121,425,180.55	\$ 96,321,898.77	\$ 3,137,910.22	30.70
Department Stores*	\$ 24,636,165.10	\$ 239,826,362.34	\$ 215,190,197.24	\$ 24,636,165.10	8.73

Appendix 4.

Retail Site Selection Criteria (Real Estate Decisions, LLC)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Alfano, Inc.	Shoes	900-1,300	◆ Enclosed malls ◆ Community strip center	Upscale	80-100	100,000	mid-high	N/A	N/A	N/A
BDBG Max Azria	Women's	4,000-12,000	◆ Enclosed malls ◆ Freestanding	Upscale	N/A	N/A	mid-high	Teen Adult Female	N/A	N/A
Big Dog Holdings, Inc.	Children's Women's Men's	1,500-3,000	◆ Enclosed malls ◆ Outlet Center ◆ Downtown/CBD ◆ Freestanding ◆ Airport/transportation Center	None	80-100	N/A	mid-high	Child Adult Senior	N/A	N/A
Carlyle & Co. Jewelers	Fine jewelry Watches	1,200-1,700	◆ Enclosed malls ◆ Freestanding	Fashion-oriented	80-100	N/A	High	Adult Senior	N/A	N/A
Chateau Stores of Canada, Ltd.	Accessories Women's Men's Shoes	3,500	◆ Enclosed Malls ◆ Community strip center ◆ Downtown/CBD	Fashion-oriented	80-100	100,000 within 5 miles	mid	Teen	25' frontage required	w/two 5-year options

Retail Category: Apparel and Accessories

Retail Category: Apparel/Accessories (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers / Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Dallas Shore Warehouse Co.	Shoes	6,000	◆ Community strip center ◆ Freestanding	Fashion-oriented Discount	60-79	75,000 within 5 miles	mid-high	N/A	N/A	w/two 5-year options
Dana's Apparel	Women's	5,500-10,000	◆ Community strip center	None	80-100	N/A	N/A	Adult Senior Female	N/A	N/A
The Elder-Beerman Stores Corp.	Department Furniture Shoes	5,000-150,000	◆ Enclosed malls ◆ Power center ◆ Community strip center ◆ Freestanding	Fashion-oriented Upscale	80-100	30,000 within 5 miles	mid-high	Adult Senior	50' frontage required	w/five 5-year options
Gantos, Inc.	Accessories Women's	6,000-7,000	◆ Enclosed malls	Fashion-oriented	80-100	N/A	mid-high	Teen Adult Female	45' frontage required	N/A
Griffin Jewelers	Fine jewelry Watches	1,500	◆ Community strip center ◆ Freestanding	None	0-19	N/A	N/A	N/A	N/A	N/A
Harve Benard, Ltd.	Women's Men's Off price/outlet	2,500-3,500	◆ Outlet Center	None	0-19	N/A	N/A	N/A	N/A	N/A
Holliday's Fashions	Women's	8,000	◆ Power center ◆ Community strip center ◆ Downtown/CBD ◆ Freestanding	Fashion-oriented	80-100	50,000 within 5 miles	mid	Teen Adult Female	50' frontage required	W/two 3-year options

Retail Category: Apparel/Accessories (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Karaz Shoe Inc.	Shoes	2,000	◆ Enclosed Mall ◆ Community strip center	None	80-100	100,000	Mid-high	N/A	N/A	N/A
Land's End Inc.	Children's Women's Men's	10,000	◆ Outlet center ◆ Community strip center ◆ Freestanding	Outlet	60-79	N/A	Mid high	Child Teen Adult	Near Major Highways	N/A
Maus Hoffman	Women's Men's Shoes	3,000	◆ Freestanding ◆ Open-air center	None	0-19	N/A	N/A	N/A	N/A	N/A
Modell's Sporting Goods	Children's Women's Men's Shoes Sport goods	13,000-18,000	◆ Enclosed malls ◆ Power center ◆ Mall pad site/out parcel ◆ Downtown/CBD	Discount	60-79	100,000 within 3 miles	N/A	N/A	85' frontage required 20' ceilings	w/three 5-year options
Northern Group	Women's Men's	3,000	◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Downtown/CBD	None	80-100	N/A	mid	Teen Adult Senior Female	N/A	N/A
The Rugged Bear, Inc.	Accessories Children's Sport goods Toys/Games	3,000-4,000	◆ Enclosed malls ◆ Community strip center ◆ Freestanding	Upscale	20-39	N/A	mid-high	N/A	N/A	N/A

Retail Category: Apparel and Accessories

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Sanrio, Inc.	Accessories Children's Cards Stationery Paper/Party Goods Toys/games	800-2,500	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Power center ◆ Outlet center ◆ Downtown/CBD 	Fashion-oriented Entertainment Upscale	80-100	250,000 within 5 miles	mid-high	Female	N/A	N/A
Seasonal Concepts	Accessories Cards Stationery Seasonal retailer	4,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center 	Fashion-oriented	80-100	N/A	mid	N/A	N/A	N/A
Victoria's Secret Stores	Women's	3,900-4,500	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Downtown/CBD ◆ Freestanding 	None	80-100	N/A	mid-high	Adult Female	N/A	N/A

Retail Category: Consumer Services

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Earl May Seed & Nursery LP	Florists/nurseries	12,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Freestanding 	None	40-59	N/A	N/A	Adult	None	s/five options
Eagle Cleaners	Dry cleaning/Laundry	1,500-2,500	<ul style="list-style-type: none"> ◆ Power center ◆ Community strip center ◆ Neighborhood strip center ◆ Freestanding 	None	80-100	N/A	mid-high	Adult	None	w/one 5-year option

Retail Category: Health Related

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Inches-A-Weigh	Nutrition/diet Center	1,400-1,600	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Neighborhood strip center 	None	80-100	125,000	mid	Adult Senior Female	N/A	N/A
Nutri/System	Nutrition/diet Center	1,200-1,400	<ul style="list-style-type: none"> ◆ Power center ◆ Community strip center 	None	80-100	N/A	N/A	Adult Female	N/A	N/A

Retail Category: Lifestyle

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Bible Factory Outlet LLC	Book stores CDs/music Religious items	3,000-4,500	<ul style="list-style-type: none"> ◆ Outlet center ◆ Community strip center ◆ Neighborhood strip center 	None	80-100	N/A	N/A	N/A	N/A	N/A
The Book Emporium, Inc.	Book stores Newsstands	5,000	<ul style="list-style-type: none"> ◆ Community strip center 	None	80-100	40,000 within 10 miles	mid-high	Adult Senior Female	N/A	N/A
Brady's Sportsman's Surplus	Sport goods	9,300	<ul style="list-style-type: none"> ◆ Community strip center 	None	80-100	N/A	N/A	N/A	N/A	N/A
Caroico Inc.	Toys/games	1,600	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center 	None	80-100	N/A	N/A	N/A	N/A	N/A
Christian Light Bookstore	Book stores	6,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Downtown/CBD ◆ Freestanding 	None	0-19	50,000 within 5 miles	mid	Adult Female	N/A	w/one 4-option
Fun Factory, Inc.	Amusement Play center Restaurant Bar	3,000-10,000	<ul style="list-style-type: none"> ◆ Enclosed malls 	Entertainment	80-100	100,000	mid	Child Teen Adult	N/A	N/A
Hobby Town USA	Art supply Craft Hobby Toys Games	3,000-10,000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Neighborhood strip center ◆ Strip center pad site/out parcel 	None	0-19	100,000	mid	Teen Adult	N/A	w/one 2-year option

Retail Category: Lifestyle (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Kessler's Sports Shops Inc.	Sport goods	2,000-6,000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Downtown/CBD ◆ Freestanding 	None	60-79	N/A	N/A	Adult	N/A	N/A
Modell's Sporting Goods	Children's Women's Men's Shoes Sport goods	13,000-18,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Power center ◆ Mall pad site/out parcel ◆ Downtown/CBD 	Discount	60-79	100,000 within 3 miles	N/A	N/A	85' frontage required 20' ceilings	w/three 5-year options
Yakima Theaters, Inc.	Movie theatres	32,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Neighborhood strip center ◆ Freestanding 	None	60-79	50,000 within 10 miles	mid	N/A	N/A	N/A

Retail Category: Home/Office

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Atwood Distributing Co.	Agriculture/farm supply Hardware Home Improvement	50,000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Free standing 	None	20-39	N/A	N/A	N/A	N/A	w/two 1-year options
Battery Patrol	Electronics Batteries	N/A	<ul style="list-style-type: none"> ◆ Freestanding 	N/A	N/A	N/A	mid-high	N/A	30' frontage required	N/A
Bestway Inc.	Rental centers	3,200	<ul style="list-style-type: none"> ◆ Community strip center ◆ Neighborhood strip center ◆ Freestanding 	Discount Grocery Supermarket	60-79	50,000 within 5 miles	low-mid	Adult	30' frontage required 25,000 traffic counts	w/two 5-year options
Car Toys, Inc.	Electronics Cellular phones	5,500	<ul style="list-style-type: none"> ◆ Power center ◆ Mall pad site/out parcel ◆ Strip center pad site/out parcel ◆ Freestanding 	None	N/A	150,000 within 5 miles	mid-high	Teen Adult	50' frontage required 28,000 traffic counts 12' ceilings 30+ parking	w/two 5-year options
Castleberry Treasures	Home decorations	5,000-10,000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Neighborhood strip center ◆ Freestanding 	None	40-59	N/A	N/A	N/A	N/A	N/A
Compucom Systems	Computers/software	3,000	<ul style="list-style-type: none"> ◆ Freestanding 	None	60-79	N/A	N/A	N/A	N/A	N/A
The Container Store	Housewares Small Appliances Storage	24,000-25,000	<ul style="list-style-type: none"> ◆ Mall pad site/out parcel ◆ Strip center pad site/out parcel 	Fashion-oriented Upscale	60-79	300,000 within 5 miles	high	Adult Female	100' frontage required 60,000 traffic counts 18' ceilings 4.5 parking/1,000 SF	w/four 5-year options

Retail Category: Home/Office (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Cyber Exchange Franchising	Computers Software	1,900-3,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Mall pad site/out parcel ◆ Downtown/CBD ◆ Freestanding 	Entertainment Upscale Discount	0-19	100,000 within 5 miles	mid-high	Adult Senior Male	16' frontage required 20,000 traffic counts Ample parking	N/A
Dixieline Lumber Co.	Hardware Home Improve	40,000-105,000	<ul style="list-style-type: none"> ◆ Power center ◆ Community strip center ◆ Freestanding 	None	20-39	200,000	mid	Adult	25,000 traffic counts	N/A
Fischer Furniture Inc.	Furniture	25,000	<ul style="list-style-type: none"> ◆ Downtown/CBD 	None	0-19	N/A	N/A	Adult	N/A	N/A

Retail Category: Home/Office (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/ Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Gimbels of Maine Inc.	Cards Stationery	5,000	♦ Community strip center ♦ Freestanding	Upscale	0-19	N/A	mid	Teen Adult Female	N/A	N/A
Grand Furniture Discount Store	Furniture	30,000	♦ Outlet center ♦ Community strip center ♦ Neighborhood strip center ♦ Freestanding	Discount	N/A	50,000 within 5 miles	low-mid	Adult	100' frontage required	N/A
H.H. Gregg	Major appliances Electronics	20,000-40,000	♦ Power center ♦ Community strip center ♦ Neighborhood strip center ♦ Freestanding	None	40-59	N/A	N/A	Adult	N/A	N/A
Inter-Continental Interiors	Furniture Home decorating	11,000	♦ Downtown/CBD ♦ Freestanding	Upscale	0-19	75,000	mid-high	Adult	Higher-income neighborhoods	w/two 5-yr options
Kyser Co. Inc.	Furniture	24,000	♦ Freestanding	N/A	0-19	N/A	N/A	Adult	N/A	N/A
Mardel	Office Supplies Furniture	20,000-35,000	♦ Community strip center ♦ Neighborhood strip center ♦ Downtown/CBD	None	0-19	N/A	N/A	Adult	N/A	N/A
Meyers and Tabakin Furniture	Furniture	25,000	♦ Freestanding	None	0-19	N/A	N/A	Adult	N/A	N/A
Payless Cashways Inc.	Hardware Home Improve	40,000-60,000	♦ Power center ♦ Community strip center ♦ Strip center pad site/out parcel	None	0-19	N/A	N/A	Adult Senior	Year byways or new developments	N/A
This End Up Furniture Co.	Furniture	2,000-2,500	♦ Enclosed malls ♦ Community strip center ♦ Neighborhood strip center	None	80-100	N/A	mid	Adult	N/A	N/A
United Paint & Chemical Corp.	Wallcoverings Paint	5,000-8000	♦ Enclosed malls	Fashion-oriented Discount	80-100	N/A	N/A	Adult	N/A	N/A

Retail Category: Food Related

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Sunrise Pantry (Astry Petroleum Co.)	Convenience stores	1,800-2,400	◆ Freestanding	None	0-19	N/A	mid	N/A	N/A	N/A
Carson's The Place for Ribs	Restaurants Bars	10,500	◆ Freestanding	None	0-19	N/A	N/A	N/A	N/A	N/A
Cedar River Seafood Restaurants, Inc.	Restaurants Bars	3,500	◆ Enclosed malls ◆ Community strip center ◆ Freestanding	None	20-39	N/A	low-mid	N/A	N/A	w/five options
Condon Oil Co.	Convenience stores	1,200-6,600	◆ Freestanding ◆ Highway	None	0-19	N/A	N/A	N/A	N/A	N/A
Debbie Wong Restaurants Inc.	Restaurants Bars	4,000	◆ Community strip center ◆ Freestanding	None	0-19	N/A	N/A	N/A	N/A	N/A
Donelan's Supermarkets Inc.	Supermarkets	30,000-56,000	◆ Community strip center ◆ Freestanding	None	80-100	N/A	mid-high	N/A	N/A	N/A
Erickson Oil Products	Convenience Stores	3,000	◆ Neighborhood strip center ◆ Freestanding ◆ Highway	None	20-39	N/A	mid	Teen Adult Senior	N/A	w/two 5-year options
Fun Factory, Inc.	Amusement Play Center Restaurants Bars	3,000-10,000	◆ Enclosed malls	Entertainment	80-100	100,000	mid	Child Teen Adult	N/A	N/A
Golden Corral Corp	Restaurants Bars	7,600-11,600	◆ Freestanding	N/A	0-19	25,000	mid	Child Adult	20,000 traffic counts required	w/two 5-year options
Jersey Mike's Franchise Systems	Fast Food	1,200-1,800	◆ Community strip center ◆ Neighborhood strip center	Entertainment Upscale	80-100	25,000 within 3 miles	mid-high	Adult	N/A	w/two 5-year options
Loard's Ice Cream & Candies, Inc.	Candy/ice Cream/Yogurt	1,200-1,500	◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Downtown/CBD	Upscale	60-79	20,000 within 1 mile	mid-high	Adult	20' frontage required	w/two 5-year options
Logan Farms Honey Glazed Hams	Fast Food	2,000	◆ Community strip center	None	80-100	N/A	high	Adult	N/A	N/A

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Lone Star Steakhouse & Saloon Inc.	Restaurants Bars	5,700	<ul style="list-style-type: none"> ◆ ◆ Community strip center ◆ Freestanding ◆ Endcap 	None	20-39	100,000 within 5 miles	N/A	Adult	20,000 traffic counts required 120 parking spaces required 110' frontage required	w/five 5-year options

Retail Category: Food Related (continued)

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Malley's Chocolates & Ice Cream	Candy/Ice Cream/Yogurt	3,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center 	None	80-100	N/A	mid-high	Adult	N/A	N/A
Marie Callendar Pie Shops, Inc.	Bakery/bagel/pretzel Restaurants Bars	6,500	<ul style="list-style-type: none"> ◆ Power center ◆ Mall pad site/out parcel ◆ Strip center pad site/out parcel ◆ Freestanding ◆ Highway 	Big-box retail	40-59	60,000 within 3 miles	mid	Adult Senior	25,000 traffic counts	w/two 5-year options
Morton's Restaurant Group, Inc.	Restaurants Bars	7,000-7,500	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Downtown/CBD ◆ Freestanding 	Fashion-oriented Entertainment Upscale	60-79	N/A	mid-high	Adult	N/A	w/one 5-year option
The Rib Crib	Restaurants Bars	2,800	<ul style="list-style-type: none"> ◆ Freestanding 	N/A	0-19	N/A	mid-high	Adult Senior	N/A	N/A
S & S Cafeterias, Inc.	Restaurants Bars	8,000-10,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center ◆ Freestanding 	None	20-39	75,000	N/A	Adult	End caps of strip centers	N/A
Skogen's IGA Foodliners	Supermarkets	30,400-70,000	<ul style="list-style-type: none"> ◆ Neighborhood strip center ◆ Freestanding 	Discount	0-19	N/A	N/A	Adult	N/A	N/A
Spring Creek BBQ	Restaurants Bars	8,000	<ul style="list-style-type: none"> ◆ Freestanding 	N/A	0-19	N/A	N/A	Adult	N/A	N/A

Target Stores	Discount Variety	90,000-182,300	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Power center ◆ Community strip center ◆ Downtown/CBD ◆ Freestanding 	None	0-19	N/A	mid	Child Teen Adult Senior	N/A	N/A
Uno Restaurant Corp.	Restaurants Bars	5,500-6,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Power center ◆ Outlet center ◆ Strip center pad site/out parcel ◆ Freestanding 	Entertainment Upscale	0-19	150,000 within 5 miles	mid-high	Child Teen Adult	25,000 traffic counts required 120+ parking	w/four 5-year options

Retail Category: Other

Company	Retail Classifications	Preferred GLA	Location Considered	Preferred Co-Tenants	% In Centers/Malls	Population Required	Income Preference	Customer Base	Special Requirements	Preferred Lease
Christmas Tree Shops, Inc.	Discount Variety Paper Party Goods	42,000-50,000	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Power center ◆ Mall pad site/out parcel ◆ Freestanding 	None	60-79	1,000,000	mid-high	Adult Female	Loading docks	N/A
Grease Monkey International	Auto supply Car care	1,856	<ul style="list-style-type: none"> ◆ Community strip center ◆ Neighborhood strip center ◆ Strip center pad site/out parcel ◆ Freestanding 	Grocery Supermarket	40-59	60,000	mid-high	Adult Senior	N/A	N/A
Security World International	Electronics Personal Property Security	1,200	<ul style="list-style-type: none"> ◆ Enclosed malls 	None	80-100	N/A	N/A	Adult Senior	N/A	N/A
Shopper's World, Inc.	Discount Variety	50,000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Freestanding 	Discount	20-39	N/A	low-mid	Adult Female	N/A	w/two 5-year options
Smeelink Optical Service Inc.	Optical Eyewear	1,600	<ul style="list-style-type: none"> ◆ Enclosed malls ◆ Community strip center ◆ Neighborhood strip center 	Fashion-oriented Upscale	80-100	N/A	high	Adult Female	N/A	w/four 3-year options
WaterNet International	Bottled water related products	1,000-1,2000	<ul style="list-style-type: none"> ◆ Community strip center ◆ Neighborhood strip center 	None	80-100	50,000 within 1 mile	mid-high	Adult Senior	N/A	2on 5-year option

Appendix 5.

Labor Market

According to a job opening survey conducted by the Employment and Training Institute, there were 24,242 full-time and 14,072 part-time job openings in the four county metropolitan Milwaukee area in May of 2000. Of these job openings, only 4% were located within the central city of Milwaukee. Within the central city, the 4% of job openings included 1,707 full-time positions and 739 part-time. However, the number of available positions fell short of meeting the 11,400 unemployed people looking for jobs.

Education and training may be a requirement for some job openings. Of the 24,242 metro Milwaukee full-time job openings, 72% required training or occupation-specific experience beyond a high school diploma. 21% of all full-time job openings were considered entry-level positions that had no education or experience requirements. However, the majority of these jobs were located outside of Milwaukee in Washington, Ozaukee or Waukesha County. 7% of all full-time positions required a high school diploma but no additional experience.

A February 1997 survey of 518 households of working age adults showed that 44% of the respondents were unemployed high school dropouts or high school graduates with no additional training. (“Employment and Training Needs of Central City Workers”, Employment & Training Institute) 15% of respondents were high school graduates with some training.

The Community Development Block Grant Administration has data on the education levels of residents within the neighborhood strategic planning areas. There are six neighborhood strategic planning areas that are part of the Fond du Lac and North neighborhood area. Table 61 below shows the education levels for the neighborhood strategic planning area. Looking at the education data, 31.85% of the residents had a high school diploma or some high school education. 4.77% of the residents had less than a 9th grade education. 21.87% of the residents had some college education, a bachelor’s degree or education beyond a bachelor’s degree.

Table 61. Education Levels for the Fond du Lac and North Neighborhood

Neighborhood Plan Areas	Total Population	Less than 9th Grade	Some High School	High School Graduate	Some College	Bachelor's/ Beyond
4- United Community	35,165	1902	4361	7806	4892	1953
5- Sherman Park	39,915	1264	2967	8737	6881	5415
8- Metcalfe Park	4,253	237	558	721	420	207
9 - Midtown	5,514	324	819	1098	491	219
10- WAICO/YMCA	9,950	777	1449	1836	990	478
11- Grandview/ Walnut Hill	14,775	728	1895	2651	1224	791
Total	109,572	5232	12049	22849	14898	9063
Percent Total Population		4.77%	11.00%	20.85%	13.60%	8.27%

Source: City of Milwaukee, Department of Administration, CDBG Program, 2002

In recent years, many cities and communities experienced low unemployment rates. The central city had an unemployment rate of 21.5% in November of 1995. (“Survey of Central City Job Seekers: Fall 1995”, Employment and Training Institute) The Community Development Block Grant Administration estimated unemployment for the neighborhood strategic planning areas in 1998. The average estimated unemployment for the Fond du Lac and North neighborhood, based on the seven neighborhood strategic planning areas, is 12.9%.

A large number of households depend upon more than one worker to support a family. A survey of 500 households conducted in 1995 by the Employment and Training Institute showed that 72% of households had two workers, 83% had three workers and 90% had four or more workers in the household.