

BUSINESS IMPROVEMENT DISTRICT NO. 26

MENOMONEE VALLEY BID

PROPOSED 2016-17 OPERATING PLAN & 2015 ANNUAL REPORT



July 15, 2016

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## **I. INTRODUCTION**

### **A. Background**

In 1984, the Wisconsin legislature created 66.1109 (formerly S. 66.608) of the Statutes (see Appendix A) enabling cities to establish Business Improvement Districts (BIDs). The purpose of the law is “to allow businesses within those districts to develop, to manage and promote the districts and to establish an assessment method to fund these activities.” (1983 Wisconsin Act 184, Section 1, legislative declaration.)

The City of Milwaukee has received a petition from property owners that requests creation of a Business Improvement District for the purpose of revitalizing and improving the Menomonee Valley business area , which is located in the heart of Milwaukee's (see Appendix A). The BID law requires that every district have an annual Operating Plan. This document serves as the Operating Plan for the proposed Menomonee Valley district. The BID proponents prepared this Plan with technical assistance from the City of Milwaukee Department of City Development.

### **B. Physical Setting**

The Menomonee Valley is primarily an industrial area, located west of Downtown Milwaukee and the Historic Third Ward. Its general boundaries are I-94 on the north, the confluence of the Menomonee and Milwaukee Rivers on the east, Bruce St. and the Soo Line Railroad tracks on the south, and U.S. 41 on the west.

### **C. District Boundaries**

Boundaries of the Menomonee Valley Business Improvement District (“district”) are shown on the map in Appendix A of this plan. A listing of the properties included in the district is provided in Appendix B.

## **II. OPERATING PLAN OBJECTIVES**

### **A. 2016-17 Plan Objectives**

The objective of the BID is to contribute to the redevelopment of the Menomonee Valley and provide important business services to the businesses within the district.

B. Principle activities to be engaged in by the district during its 2016-17 fiscal year of operation will include:

- a. Continue to update and implement the Menomonee Valley 2.0 Plan and the Menomonee Valley Strategic Plan.
- b. Grow the Menomonee Valley brand by placing emphasis on the creation of signage, a new website, streetscaping, co-marketing between Valley businesses, and spreading information to employees that help to shape the overall Valley image.
- c. Develop a team to help develop and outline workforce development priorities for 2016-17
  - i. Expand Menomonee Valley Career Days Program to include a Young Women in STEM and Engineering component, as well as professional development opportunities for teachers.
  - ii. Develop Menomonee Valley Workforce Circles program to provide unique opportunities for workforce professionals to engage, learn and network.

- d. MVP will partner with MetroGo to conduct a last mile study. Like suburban business parks, the Valley has issues with workers being able to access the last mile to the workplace. MetroGo will assist with developing a survey similar to one they used for Oak Creek, and MVP will administer. MetroGo will analyze data, map employers, job creation, wages, and help determine if transit solutions exist.
- e. Facilitate redevelopment of vacant parcels and tour predevelopment sites to create an area of focus for infrastructure needs as we move forward with predevelopment opportunities in the Valley.
- f. Facilitate streetscaping and create solutions to parking issues along the St. Paul Ave. corridor and the Valley's west end.
- g. Recruit quality tenants to the District with a focus on St. Paul Ave. and Reed Street Yards that will provide family supporting jobs and contribute to the Milwaukee economy.
- h. Collaborate with the Department of Transportation and stakeholders in and around the Valley on the I-94 East-West planning process, which will impact access to the Valley as well as directly impact property owners and businesses.
- i. Develop an emergency/evacuation plan that provides evacuation and disaster recovery relief for the entire district.
- j. Maintain effective, ongoing communication and coordination with Valley stakeholders, the real estate and development community and other government officials and business leaders involved in business recruitment and retention activities.
- k. Promote the construction of catalytic infrastructure projects to allow access to priority redevelopment areas and underutilized development sites.
- l. Facilitate the development of business resources for companies operating throughout the district.
- m. Provide improvements, resources and services for improving the aesthetic appearance of St. Paul Ave through the St. Paul Exterior Enhancements Grant.
- n. Create new ways to engage Valley employees, area residents and visitors to discover and explore the opportunities directly in the Valley.
- o. Negotiate on behalf of the District with the City of Milwaukee, Wisconsin Department of Natural Resources, Department of Transportation, and other local, state and federal agencies with jurisdiction to the Menomonee Valley.
- p. Develop Business-to-Business opportunities to increase the buyer and vendor relationships amongst Valley businesses through networking events such the Menomonee Valley Business Association.
- q. Develop options for site improvements throughout the District.
- r. Implement the ongoing Graffiti Removal Program in the District whereby properties within the District boundary will be eligible to have graffiti removed at a minimal cost.
- s. Develop new ways to communicate safety needs throughout the Menomonee Valley by improving the overall safety and neighborhood relations for all areas of the Menomonee Valley.
- t. Collaborate with Valley businesses to develop and provide exceptional business services to companies through resource provision, training, and direct programming along the Hank Aaron State Trail.
- u. Organize and provide support to the "Stew Crew" teams of volunteers from Valley companies in their efforts to keep Valley public areas well maintained and remove invasive species along the Hank Aaron State Trail.
- v. Facilitate and create awareness of the public transportation options throughout the Menomonee Valley that optimizes vehicle, public transit, bicycle and pedestrian access, thus ensuring that Valley businesses are accessible to the surrounding workforce.

- w. Administrative activities including, but not limited to, securing an independent certified audit, securing insurance for the activities of the District Board, and complying with the open meeting law, Subchapter V of Chapter 19 of the Wisconsin Statutes.

**III. PROPOSED DISTRICT BUDGET**

INCOME

2016 Special Assessments.....\$180,435.15

Menomonee Valley Business Association dues..... \$500.00

**Total Income.....\$180,935.15**

EXPENSES

Yearly contract with Menomonee Valley Partners, Inc., a 501 (c)(3) organization, to assist in staffing and implementation of activities outlined above ..... \$125,000.00

St. Paul Enhancement Grant.....\$25,000.00

I-94/Consultant/Transportation Programming.....\$5,000.00

Workforce Development Programming.....\$5,000.00

Transit planning study with MetroGO.....\$5,000.00

Last Mile transportation study with Public Policy Forum.....\$5,000.00

Friends of the Hank Aaron State Trail Run/Walk.....\$2,000.00

End of Year Meeting.....\$1,500.00

Graffiti Removal.....\$2,000.00

Valley Maintenance.....\$2,000.00

Insurance.....\$1,300.00

Audit .....\$1,800.00

**Total Expenses.....\$ 181,100.00**

NET ASSETS at June 30, 2016 ..... **\$147,833.00**

It is proposed to raise \$180,935.15 through BID assessments and fees collected (see Appendix B). The BID Board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

#### IV. ORGANIZATION OF DISTRICT BOARD

The board's primary responsibility will be implementation of this Operating Plan. This will require the board to negotiate with providers of services and materials to carry out the Plan; to enter into various contracts; to monitor development activity; to periodically revise the Operating Plan; to ensure district compliance with the provisions of applicable statutes and regulations; and to make reimbursements for any overpayments of BID assessments.

State law requires that the board be composed of at least five members and that a majority of the board members be owners or occupants of property within the district.

It is recommended that the BID board be structured and operate as follows:

1. Board Size – Eight
2. Composition – The majority of members shall be owners or occupants of property within the district. Any non-owner or non-occupant appointed to the board shall be a resident of the City of Milwaukee. The board shall elect its Chairperson from among its members.
3. Term - Appointments to the board shall be for a period of three years.
4. Compensation – None
5. Meetings - All meetings of the board shall be governed by the Wisconsin Open Meetings Law.
6. Record Keeping - Files and records of the board's affairs shall be kept pursuant to public record requirements.
7. Staffing - The board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof.
8. Meetings - The board shall meet regularly, at least twice each year. The board shall follow rules of order (“by laws”) to govern the conduct of its meetings.

The BID shall be a separate entity from Menomonee Valley Partners, Inc. (MVP), notwithstanding the fact that members, officers and directors of each may be shared. MVP shall remain a private organization, not subject to the open meeting law, and not subject to the public record law except for its records generated in connection with the BID board. MVP may, and it is intended, shall, contract with the BID to provide services to the BID, in accordance with this Plan.

The primary responsibility of the BID will be the implementation of the operating plan in accordance to the needs of the district. The current 2016-17 BID Board is represented by the following members:

***Chairman:***

John Brennan  
J.M. Brennan, Inc.  
johnb@jmbrennan.com

***Vice-Chair:***

Larry Stern  
Standard Electric Supply Company  
lstern@standardelectricsupply.com

**Treasurer:**

John Jennings  
Materion, Inc.  
John.Jennings@materion.com

Jeff Morgan  
Allied Insulation Supply Co.  
jmorgan@alliedinsulation.com

David Brien  
Potawatomi Hotel & Casino  
dbrien@paysbig.com

Joyce Koker  
Harley-Davidson Museum  
Joyce.Koker@harley-davidson.com

Art Downey  
Taylor Dynamometer  
artd@taylordyno.com

Dan Sterk  
Rexnord Industries  
Dan.Sterk@rexnord.com

## V. METHOD OF ASSESMENT

### A. Assessment Rate and Method

To support the District Board's budget for calendar year 2016, the City of Milwaukee shall levy in 2016 and carry into the tax rolls for inclusion in tax bills to be sent out in December 2016 special assessments on all properties in the District subject to special assessment. Property that is not tax-exempt shall be included in the property subject to special assessment. The District Board uses a special assessment formula, whereby each tax key number parcel is assessed the rate of \$1.65 per \$1,000 in assessed property value, subject to a minimum assessment per tax key number parcel of \$400 and a maximum assessment per tax key number parcel of \$4,000.

The principle behind the assessment methodology is that each property should contribute to the BID in proportion to the benefit derived from the BID. After consideration of other assessment methods, it was determined that assessed value of a property was the characteristic most directly related to the potential benefit provided by the BID. Therefore, a fixed assessment rate based on the assessed value of the property was selected as the basic assessment methodology for this BID.

However, maintaining an equitable relationship between the BID assessment and the expected benefits requires an adjustment to the basic assessment method. To prevent the disproportional assessment of a small number of high value properties, a maximum assessment of \$4,000 per parcel will be applied, and a minimum assessment of \$400 per parcel will be applied.

As of January 1, 2016, the property in the proposed district had a total assessed value of more than **\$287.3 million**. This plan proposed to assess the property in the district at a rate of \$1.65 per \$1,000.00 of assessed value, subject to the maximum and minimum assessments, for the purposes of the BID.

Appendix B shows the projected BID assessment for each property included in the district.

### B. Excluded and Exempt Property

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

1. State Statute 66.1109(1) (f) Im: The district will contain property used exclusively for manufacturing purposes, as well as properties used in part for manufacturing. These properties will be assessed

according to the method set forth in this plan because it is assumed that they will benefit from development in the district.

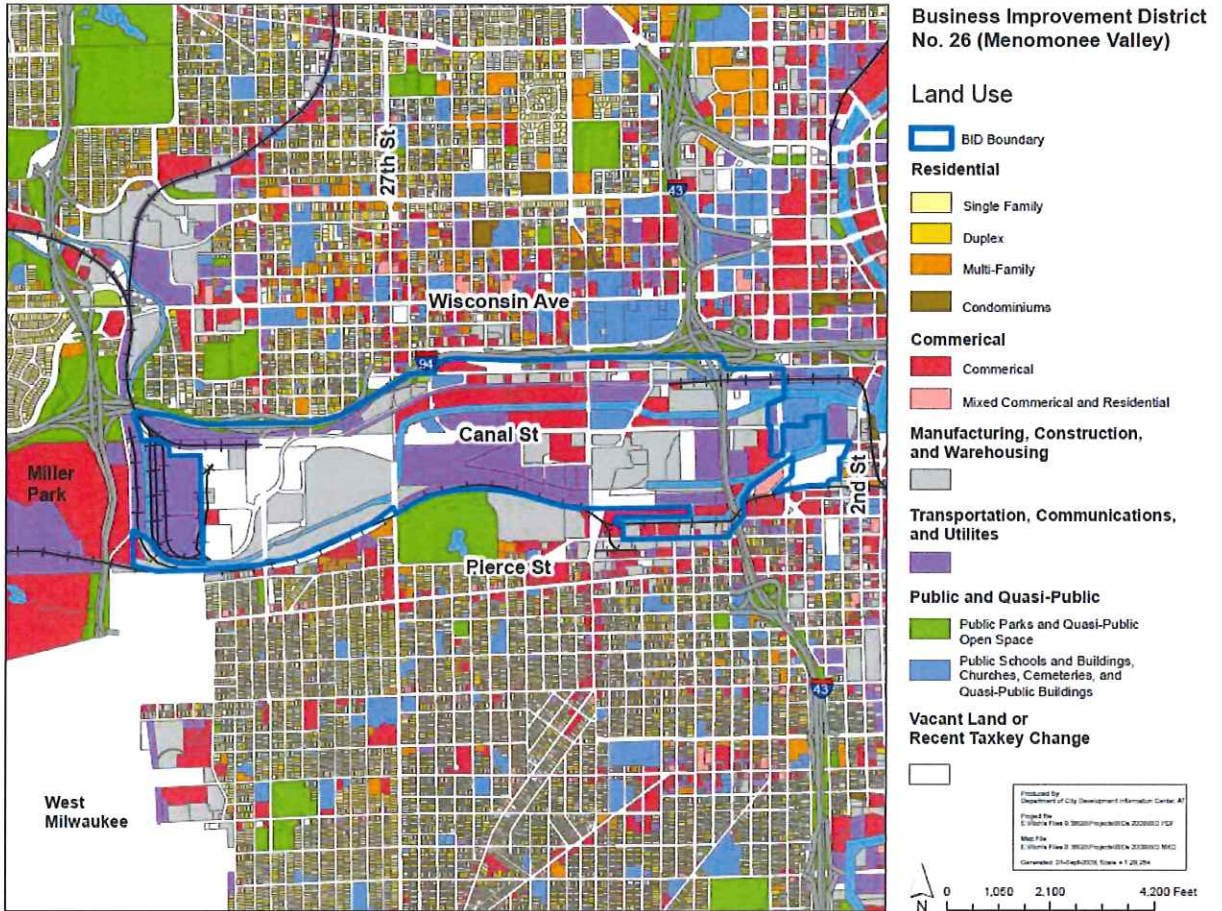
2. State Statute 66.1109(5) (a): Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix B, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding State Statute 66.1109(1) (b), property exempt from general real estate taxes has been excluded from the district. Privately owned tax-exempt property adjoining the district and which is expected to benefit from district activities may be asked to make a financial contribution to the district on a voluntary basis.



APPENDICES

- A. DISTRICT BOUNDARIES
- B. 2016 PROJECTED ASSESSMENTS
- C. 2015 ANNUAL REPORT
- D. 2015 AUDIT

APPENDIX A: DISTRICT BOUNDARIES



**APPENDIX B: 2016 PROJECTED ASSESSMENTS, SORTED BY TAX KEY**

<b>Taxkey</b>	<b>property class</b>	<b>Address</b>	<b>Owner1</b>	<b>Total ASMT</b>	<b>BID #26 ASMT</b>
3611587116	Exempt	701 W ST PAUL	STATE OF WISCONSIN	0	0
3611611110	Exempt	809 W ST PAUL	MILWAUKEE COUNTY	0	0
3611617200	Exempt	651 W ST PAUL	CITY OF MILWAUKEE	0	0
3612141000	Exempt	260 N 12TH	CITY OF MILW REDEV AUTH	0	0
3612142000	Exempt	907 W HINMAN	STATE OF WISCONSIN	0	0
3612143000	Exempt	825 W HINMAN	CITY OF MILW REDEV AUTH	0	0
3970001113	Local Commercial	126 N 6TH	HD MILW LLC	11924000	4000
3978006000	Exempt	216 N 6TH	CITY OF MILWAUKEE	0	0
3980181100	Manufacturing	1118 W ST PAUL	JRB VIII LLC	64500	400
3980184100	Exempt	940 W ST PAUL	STATE OF WISCONSIN DEPT OF	0	0
3980303110	Special Mercantile	712 W CANAL	ST MARY'S CEMENT INC	1632000	2692.8
3980305112	Local Commercial	880 W CANAL	ST MARY'S CEMENT	117000	400
3980403100	Manufacturing	324 N 12TH	JRB VIII LLC	1729600	2853.84
3980405112	Exempt	1027 W ST PAUL	STATE OF WISCONSIN	0	0
3980406200	Exempt	825 W ST PAUL	MILWAUKEE COUNTY	0	0
3980410100	Exempt	270 N 12TH	SOO LINE RAILROAD COMPANY	0	0
3980411111	Exempt	1056 W CANAL	WISCONSIN ELECTRIC POWER CO	0	0
3980698100	Local Commercial	1505 W ST PAUL	READCO	353700	583.61
3980700100	Local Commercial	1601 W ST PAUL	CREAM CITY YARDS LLC	107000	400
3980702000	Local Commercial	1635 W ST PAUL	CALEDONIA PROPS 1635 LLC	668700	1103.36
3980705110	Manufacturing	1701 W ST PAUL	STONE PROPERTIES LLC	438000	722.7
3980705120	Local Commercial	1719 W ST PAUL	GARNET ABRASIVE & WATER	191000	400
3980707000	Local Commercial	1739 W ST PAUL	PATRICIA J OLIVOTTI TRUSTEE	316000	521.4
3980713000	Local Commercial	1925 W ST PAUL	HENRY ALBERT & SANDRA ALBERT	256000	422.4
3980803112	Manufacturing	405 N 12TH	CR INTERNATIONAL INC	1138300	1878.2
3980803210	Exempt	404 N 13TH	MILWAUKEE COUNTY	0	0
3980805000	Special Mercantile	315 N 12TH	ANCHOR ENTERPRISES II	685200	1130.58
3980903100	Exempt	1313 W MT VERNON	CITY OF MILWAUKEE	0	0
3980904000	Exempt	1301 W MT VERNON	CITY OF MILWAUKEE	0	0
3980906111	Local Commercial	1601 W MT VERNON	GIUFFRE I LLC	1373100	2265.62
3980917110	Exempt	1540 W CANAL	CITY OF MILWAUKEE	0	0
3980920110	Exempt	1818 W CANAL	MARQUETTE UNIVERSITY	0	0
3981211000	Local Commercial	1108 W CANAL	WISCONSIN ELECTRIC POWER CO	37600	400
3981212110	Local Commercial	1200 W CANAL	CANAL STREET YACHT CLUB LLC	801000	1321.65

3981221100	Local Commercial	131 N 6TH	H D MILW LLC	677282	1117.52
3981231000	Special Mercantile	222 N EMMBER	STANDARD ELECTRIC SUPPLY CO	965000	1592.25
3981232100	Manufacturing	254 N EMMBER	481DA LLC	652200	1076.13
3981241000	Local Commercial	272 N 12TH	MYRIAD PROPERTY GROUP LLC	650000	1072.5
3981242000	Special Mercantile	250 N 12TH	ASTOR APTS LTD PTN	3472000	4000
3981261000	Local Commercial	1205 W MT VERNON	MV3, LLC	620000	1023
3990013110	Manufacturing	1610 W ST PAUL	WISC INVESTMENT CO LLC	898000	1481.7
3990026000	Manufacturing	1500 W ST PAUL	MONITOR CORP	488200	805.53
3990213111	Local Commercial	1922 W ST PAUL	1922 WEST ST PAUL LLC	70300	400
3990215110	Manufacturing	1906 W ST PAUL	RML HOLDINGS LLC	131800	400
3990229110	Local Commercial	1816 W ST PAUL	PAIN ENTERPRISES INC	217000	400
3990231111	Local Commercial	1800 W ST PAUL	LCM FUNDS 30 ST PAUL LLC	34000	400
3990271000	Local Commercial	1900 W ST PAUL	SOBELMANS 1900 LLC	291000	480.15
3990272000	Local Commercial	1902 W ST PAUL	YVONNE M ZAFFIRO REVOCABLE	22000	400
3990281100	Local Commercial	1300 W CANAL	CANAL ST LLC	1610000	2656.5
3990291000	Special Mercantile	1741 W ST PAUL	LCM FUNDS 30 ST PAUL LLC	1195000	1971.75
3990292000	Special Mercantile	1907 W ST PAUL	HENRY ALBERT &	270000	445.5
3998001000	Exempt	144 N EMMBER	CITY OF MILWAUKEE	0	0
3998002000	Exempt	150 N 16TH	CITY OF MILWAUKEE	0	0
3999984000	Exempt	1719 W ST PAUL	SOO LINE RAILROAD COMPANY	0	0
3999988100	Local Commercial	1418 W ST PAUL	PRUNE LLC	902400	1488.96
3999988200	Exempt	1418 W ST PAUL	MILWAUKEE COUNTY	0	0
3999990100	Manufacturing	1410 W ST PAUL	CR INTERNATIONAL INC	88700	400
3999991100	Manufacturing	407 N 13TH	CR INTERNATIONAL INC	1092700	1802.96
3999991200	Exempt	421 N 13TH	MILWAUKEE COUNTY	0	0
3999996000	Exempt	301 N 13TH	SOO LINE RAILROAD COMPANY	0	0
3999997100	Local Commercial	1357 W ST PAUL	1435 CORPORATION	198800	400
3999997200	Special Mercantile	324 N 15TH	READCO	551000	909.15
3999999110	Local Commercial	313 N 13TH	FOREST COUNTY POTAWATOMI	2454000	4000
4000401110	Local Commercial	2501 W ST PAUL	DOGS WORLD LLC	352000	580.8
4000774110	Special Mercantile	2326 W ST PAUL	2326 LLC	1189200	1962.18
4000784110	Local Commercial	2015 W ST PAUL	HENRY ALBERT & SANDRA ALBERT	538000	887.7
4000786110	Manufacturing	2033 W ST PAUL	2033 ASSOCIATES LLP	434300	716.6
4000788100	Local Commercial	2045 W ST PAUL	CALEDONIA PROPERTIES 2045	226000	400
4000789110	Local Commercial	2101 W ST PAUL	BRENNAN FAMILY	2454000	4000
4000931000	Exempt	2142 W CANAL	CITY OF MILWAUKEE	0	0
4000971000	Special Mercantile	2122 W MT VERNON	GIUFFRE VIII LLC	5171000	4000
4000972000	Special Mercantile	200 N 25TH	GIUFFRE VIII LLC	965000	1592.25
4009990000	Local Commercial	321 N 25TH	ALMACEN DEVELOPMENT LLC	262000	432.3
4009991110	Local Commercial	305 N 25TH	ALMACEN DEVELOPMENT LLC	404000	666.6
4009991213	Exempt	2612 W GREVES	CITY OF MILWAUKEE	0	0

4009991215	Special Mercantile	2612 W GREVES	2612 GREVES LLC	1070000	1765.5
4009992000	Exempt	2401 W ST PAUL	SOO LINE RAILROAD COMPANY	0	0
4009995115	Exempt	2401 W ST PAUL	WIS DEPT OF TRANSPORTATION	0	0
4009995118	Special Mercantile	2001 W MT VERNON	GIUFFRE I LLC	636000	1049.4
4009998111	Manufacturing	2615 W GREVES	DIEDRICH ACQUISITIONS LLC	1101700	1817.81
4009999221	Exempt	199 N 25TH	MILWAUKEE METROPOLITAN WISCONSIN ELECTRIC POWER CO	0	0
4010403120	Exempt	3200 W CANAL	WISCONSIN ELECTRIC POWER CO	0	0
4010406100	Exempt	104 N 32ND	WISCONSIN ELECTRIC POWER CO	0	0
4010407200	Exempt	100 N 32ND	MILWAUKEE COUNTY	0	0
4010409111	Exempt	3002 W CANAL	CITY OF MILWAUKEE WISCONSIN ELECTRIC POWER CO	0	0
4011238000	Exempt	218 N 29TH	WISCONSIN ELECTRIC POWER CO	0	0
4011249110	Exempt	2928 W GREVES	WISCONSIN ELECTRIC POWER CO	0	0
4011401113	Exempt	2702 W GREVES	STATE OF WISCONSIN WISCONSIN ELECTRIC POWER CO		0
4011703100	Exempt	3300 W CANAL	WISCONSIN ELECTRIC POWER CO	0	0
4011703200	Exempt	3400 W CANAL	MILWAUKEE COUNTY	0	0
4011705000	Exempt	3429 W STEVENSON	MILWAUKEE COUNTY	0	0
4019998000	Exempt	2615 W GREVES	SOO LINE RAILROAD COMPANY	0	0
4019999110	Manufacturing	123 N 27TH	THIELE TANNING CO	613100	1011.62
4020026000	Exempt	3520 W CANAL	MILWAUKEE COUNTY WISCONSIN ELECTRIC POWER CO	0	0
4020718100	Exempt	4000 W CANAL	WISCONSIN ELECTRIC POWER CO	0	0
4020902110	Exempt	200 N 44TH	STATE OF WIS DEPT OF	0	0
4230001000	Local Commercial	600 S 44TH	JOHN F STIMAC JR	514800	849.42
4230012000	Exempt	212 S 36TH	CITY OF MILW REDEV AUTH	0	0
4230014000	Manufacturing	3880 W MILWAUKEE	MULHANEY PROPERTIES LLC	1532600	2528.79
4230016000	Special Mercantile	3883 W MILWAUKEE	CALEFFI NORTH AMERICA INC	2600000	4000
4230021000	Manufacturing	3630 W WHEELHOUSE	VALTAY LLC	2899000	4000
4230031000	Special Mercantile	3800 W CANAL	HSI INDUSTRIAL I LLC	7535000	4000
4230032000	Manufacturing	3757 W MILWAUKEE	INGETEAM INC	7244900	4000
4230041000	Exempt	3889 W WHEELHOUSE	REDEVELOPMENT AUTHORITY	0	0
4230042000	Manufacturing	3754 W MILWAUKEE	CAM-JWM LLC	9542600	4000
4230051000	Special Mercantile	3880 W WHEELHOUSE	53RD STREET IP LLC	3453000	4000
4230052000	Exempt	3760 W WHEELHOUSE	CITY OF MILWAUKEE REDEV AUTH	0	0
4230053000	Exempt	3910 W WHEELHOUSE	CITY OF MILWAUKEE REDEV AUTH	0	0
4239999013	Exempt	101 S 35TH	SOO LINE RAILROAD COMPANY	0	0
4239999017	Exempt	400 S 44TH	THE SE WI PROFESSIONAL	0	0
4240311100	Manufacturing	3301 W CANAL	PALERMO PROPERTIES , LLC	15254300	4000
4240321000	Manufacturing	185 S 33RD	BRIJOHN VENTURES III LLC	3392900	4000

4240322000	Special Mercantile	3340 W ROUNDHOUSE	TRIONY MILWAUKEE LLC	5373000	4000
4240331000	Exempt	3711 W CANAL	CITY OF MILWAUKEE REDEV AUTH	0	0
4240332000	Exempt	500 S 33RD	CITY OF MILWAUKEE REDEV AUTH	0	0
4240333000	Exempt	400 S LAYTON	CITY OF MILWAUKEE REDEV AUTH	0	0
4249998111	Manufacturing	3001 W CANAL	REXNORD INDUSTIES LLC	9713800	4000
4249999400	Exempt	3402 W CANAL	CITY OF MILWAUKEE	0	0
4249999410	Exempt	2951 W CANAL	CITY OF MILWAUKEE	0	0
4250001000	Local Commercial	2005 W POTAWATOMI	FOREST COUNTY POTAWATOMI	806300	1330.4
4250002000	Local Commercial	2011 W POTAWATOMI	FOREST COUNTY POTAWATOMI	175800	400
4250003000	Local Commercial	2017 W POTAWATOMI	FOREST COUNTY POTAWATOMI	160000	400
4259981111	Exempt	2601 W CANAL	SOO LINE RAILROAD COMPANY	0	0
4260022100	Manufacturing	210 S EMMBER	ALDRICH CHEMICAL CO INC	1124700	1855.76
4260033120	Manufacturing	219 S EMMBER	EMMPACK FOODS INC	2789800	4000
4260061110	Local Commercial	1513 W CANAL	FOREST COUNTY POTAWATOMI	532000	877.8
4260071113	Local Commercial	1901 W CANAL	FOREST COUNTY POTAWATOMI	2733000	4000
4260072110	Local Commercial	1850 W POTAWATOMI	FOREST COUNTY POTAWATOMI	195000	400
4260111000	Special Mercantile	1611 W CANAL	FOREST COUNTY POTAWATOMI	85725000	4000
4260112000	Exempt	1721 W CANAL	US OF AMERICA IN TRUST FBO	0	0
4260131000	Local Commercial	104 S EMMBER	PFC INC	100000	400
4260132100	Special Mercantile	1207 W CANAL	ZIEGLER BENCE PARTNERS 5 LLC	8467000	4000
4260132200	Special Mercantile	1205 W CANAL	WISCONSIN ELECTRIC POWER CO	467500	771.38
4260133000	Manufacturing	320 S EMMBER	EMMPACK FOODS INC	946700	1562.06
4260141000	Local Commercial	320 S 19TH	FOREST COUNTY POTAWATOMI	35891000	4000
4269934122	Exempt	1702 W BRUCE	SOO LINE RAILROAD COMPANY	0	0
4269958112	Local Commercial	301 S 19TH	FOREST COUNTY POTAWATOMI	386700	638.06
4269958200	Local Commercial	1916 W POTAWATOMI	FOREST COUNTY POTAWATOMI	14900	400
4269965111	Exempt	520 S MUSKEGO	SOO LINE RAILROAD COMPANY	0	0
4269965112	Local Commercial	500 S MUSKEGO	SOO LINE RAILROAD COMPANY	325000	536.25
4269985000	Manufacturing	1400 W BRUCE	MID-CITY FOUNDRY CO	330700	545.66
4269986000	Special Mercantile	1304 W BRUCE	GRAYMONT WESTERN LIME INC	738000	1217.7
4270101100	Local Commercial	754 W VIRGINIA	754 PARKING LLC	124800	400
4270103100	Special Mercantile	800 W VIRGINIA	LCM FUNDS 21 BOTTLING	29900	400
4270103210	Exempt	800 W VIRGINIA	MILWAUKEE COUNTY	0	0
4270103220	Exempt	840 W VIRGINIA	CITY OF MILWAUKEE	0	0
4270104100	Special Mercantile	840 W VIRGINIA	AHMED A KAHIN	300000	495
4270203111	Local Commercial	131 S 7TH	WISCONSIN ELECTRIC POWER CO	352800	582.12

4270203120	Exempt	833 W CANAL	STATE OF WI	0	0
4270204000	Exempt	800 W VIRGINIA	SOO LINE RAILROAD COMPANY	0	0
4270207100	Local Commercial	754 W VIRGINIA	BERNARD KLEIN	121400	400
4270210111	Exempt	902 W BRUCE	SOO LINE RAILROAD COMPANY	0	0
4270210112	Local Commercial	904 W BRUCE	SOO LINE RAILROAD COMPANY	57400	400
4270401110	Special Mercantile	920 W BRUCE	ARCHER-DANIELS-MIDLAND CO	625000	1031.25
4270403100	Exempt	1019 W CANAL	WISCONSIN ELECTRIC POWER CO	0	0
4270406110	Special Mercantile	1135 W CANAL	WISCONSIN ELECTRIC POWER CO	40000	400
4270409121	Special Mercantile	1201 W CANAL	RNC CANAL ST PROPERTY LLC	1900000	3135
4270411110	Exempt	1102 W BRUCE	SOO LINE RAILROAD COMPANY	0	0
4270411120	Local Commercial	1104 W BRUCE	SOO LINE RAILROAD COMPANY	294300	485.6
4270417110	Local Commercial	450 S 11TH	TRIPLE S AUTO PARTS INC	164500	400
4270418100	Special Mercantile	470 S 11TH	KIN TRUCKING LLC	141300	400
4270422100	Special Mercantile	902 W BRUCE	CRUZ M ACOSTA PEDROZA	36800	400
4270422200	Local Commercial	904 W BRUCE	DOMINGO MUNOZ	58000	400
4270425000	Local Commercial	1102 W BRUCE	AKSS, LLC	611000	1008.15
4270426000	Local Commercial	1134 W BRUCE	BERNARD KLEIN	206200	400
4270427000	Special Mercantile	1230 W BRUCE	BRUCE STREET PROPERTIES LLC	604000	996.6
4270531100	Local Commercial	143 S 6TH	H D MILW LLC	761500	1256.48
4270541000	Local Commercial	841 W CANAL	WISCONSIN ELECTRIC POWER CO	412200	680.13
4270542111	Special Mercantile	643 W CANAL	LONE STAR INDUSTRIES AKA	2381000	3928.65
4270571100	Local Commercial	530 S 11TH	JNA INVESTMENT	367000	605.55
4270581000	Exempt	521 S 9TH	THE COMMUNITY WAREHOUSE INC	0	0
4270582000	Local Commercial	1000 W BRUCE	DL STRANGE PROPERTIES LLC	380300	627.5
4270591000	Mercantile Apartment	615 W FRESHWATER	BUILDING 41 LLC	423000	697.95
4281021000	Special Mercantile	310 W FRESHWATER	BUILDING 41 LLC	2375800	3920.07
4281024000	Special Mercantile	330 W FRESHWATER	BUILDING 41 LLC	55700	400
4281051000	Special Mercantile	360 W FRESHWATER	BUILDING 41 LLC	572300	944.3
4281052000	Special Mercantile	432 W FRESHWATER	BUILDING 41 LLC	2143400	3536.61
4281061000	Special Mercantile	425 W FRESHWATER	BUILDING 41 LLC	4615300	4000
4281062000	Special Mercantile	511 W FRESHWATER	C.D. SMITH CONSTRUCTION INC	1386900	2288.39
4288001000	Exempt	200 S 6TH	CITY OF MILWAUKEE	0	0
4310312000	Exempt	500 S 35TH	CITY OF MILWA REDEV AUTH	0	0
				<b>\$287,307,182.00</b>	<b>\$180,435.15</b>

Business Improvement District #26  
2015-16 Annual Report

The Menomonee Valley Business Improvement District (BID #26) Board of Directors adopted its 2015-16 Operating Plan in September of 2015. In this program year the following administrative actions occurred:

**Board of Directors**

In the 2015-16 year, Business Improvement District #26 updated the bylaws and increased the number of board members to 8 by appointing Joyce Koker of the Harley-Davidson Museum and Dan Sterk of Rexnord Industries. Larry Stern was reappointed to the board for another term. The leadership of the BID #26 is as follows; John Brennan – President, Larry Stern – Vice-President, John Jennings – Treasurer, N/A – Secretary, David Brien – Member at Large, Art Downey – Member at Large, Jeffrey Morgan – Member at Large, Joyce Koker – Member at Large and Dan Sterk – Member at Large.

**Finances**

- a. The BID contracted with Ritz Hollman to provide an audit. The BID assessment for 2015 totaled \$121,246.00. Per its Operating Plan, the BID paid \$125,000 to Menomonee Valley Partners, Inc. for staffing the BID programs; \$1,800.00 in audit expenses; \$1610.85 for Valley Career Days; \$845.00 for Annual BID Member Meeting; paid off \$60,000, which is the remainder of the 10-year \$100,000 pledge to UEC/MVP Project Inc.; \$820.00 in graffiti expenses; \$1,285.96 Directors & Officers Insurance. Dues collected from the Menomonee Valley Business Association totaled \$500.00. The Board voted to make a contribution of \$2,000 to the Friends of the Hank Aaron State Trail in support of the 16<sup>th</sup> Annual Hank Aaron State Trail Run/Walk. The BID completed its 2015-16 fiscal year with \$147,833.00 in its account. **The total amount of expenses were \$193,361.81.**
- b. The BID has a contract through Menomonee Valley Partners, Inc. with Scribner Cohen to do ongoing bookkeeping services.

**ACTIVITIES OF MENOMONEE VALLEY PARTNERS, INC. AS STAFF TO THE BID**

In June 2015, BID #26 renewed its ongoing partnership with Menomonee Valley Partners, Inc. (MVP) through entering into an agreement, through which the BID will contribute \$125,000 in funding towards MVP's programmatic activities benefitting the BID and its members. Through this agreement, MVP will continue to facilitate various programs to improve the district in key ways, including workforce development, safety and maintenance, economic development, transportation, physical improvements and marketing and special events.

In recognition of the increasing amount of work directly benefitting employers and employees of the Valley, the available levels of funding in the philanthropic community and competition for those funds, and the value the District receives from the work of the BID and MVP, the BID Board elected to propose modestly increasing the rate, floor, and ceiling of the BID assessment. With the increased total assessment levied, the BID will be able to allocate a larger amount of funding to MVP and implement priority projects in the Valley and continue the redevelopment goals detailed in the Menomonee Valley 2.0 Plan.



Below you will find the accomplishments and highlights of the past year through the lenses of the 6 strategic goals.

**Encourage and facilitate high-quality redevelopment of vacant parcels and underutilized properties, with a current focus on the East End of the Valley and the St. Paul Avenue corridor.**

- **Reed Street Yards** is continuing to be developed as the City Plan Commission approved the second building on the site. The 52,000 square-foot building will include a rooftop patio and a 75-vehicle parking lot that minimizes impact on the pedestrian experience.
- **City Lights Brewing Co.** plans to develop two buildings in the City Lights business park as a brew house and tasting facility.
- **The Real Estate Open House** took place on September 29 and was sponsored by Gilbane and RFP Commercial Inc. The open house spotlighted properties on St. Paul Ave. to showcase the corridor's real estate potential.
- **The East End Pre-Development Committee** kicked off in October. The Committee will focus on the City's properties in terms of environmental, infrastructure, and financing needs to ready these parcels for sale.
- Staff worked with city to create a **new zoning category**, IC – Industrial Commercial, for St. Paul Ave. This would preserve the zoning for all current industrial uses, preclude residential-type uses, and add limited use standards for certain use classifications.
- An initial meeting was held to discuss the possibility of creating a **bike/ped bridge between the Valley and Walker's Point**, a concept that is included in both the Valley and Walker's Point master plans. The meeting included the Walker's Point Association, MVP, City of Milwaukee, Reed Street Yards, General Capital, MMSD, Harley-Davidson Museum, and La Dallman Architects.

**Recruit and retain high-yield, high-quality employers.**

- **Zurn Industries**, a division of Rexnord is moved its headquarters from Pennsylvania to Reed Street Yards. Occupying the 52,000 square-foot building will be 120 employees earning an average of \$75,000/year This is the first construction of the Reed Street Yards project.
- **Lohmann & Rauscher** conducted their grand opening of its headquarters in the fall of 2016.
- A committee composed of members that really understand the environmental issues as well as food and beverage was organized to address the Valley's **East End**. This mix of committee members was needed for the predevelopment and marketing of those properties.
- **The St. Paul Avenue businesses** have been collaborating and developed work teams that will focus on zoning and design guidelines, streetscaping, and business recruitment. There is great potential to grow off current anchors: BBC Lighting, Brass Light Gallery, and House of Stone into a Design/Décor District.
- **City Lights Brewery** has signed their lease agreement, cleared the building, held a smudging ceremony with partners, and is now beginning renovation work aimed at a summer opening. Third Space Brewing has pulled permits and is getting ready to start its renovations.
- Staff worked with city to create a **new zoning category**, IC – Industrial Commercial, for St. Paul Ave. This would preserve the zoning for all current industrial uses, preclude residential-type uses, and add limited use standards for certain use classifications.
- The **Exterior Enhancement Pilot Grant Program** will return as a project to help businesses along St Paul Ave make exterior enhancements to their facades. The City is updating the application and working to secure funds in the budget. Currently, we would have \$100,000 pool of funds, matched by \$25,000 from the BID.

**Connect Valley employers to a regional, job-ready workforce to meet their needs and position local workers to be competitive for upcoming employment opportunities.**

- In partnership with Milwaukee Public Schools our 2015-16 season of **Menomonee Valley Career Days** was very successful. We worked with five schools to bring in over 125 area high school youth to tour and meet with local manufacturing and engineering professionals.
- The Menomonee Valley hosted its first **Young Women in Engineering Day**. Rexnord, Harley-Davidson Museum, Department of Transportation, We Energies, Joy Global and Zimmerman participated in making this day a success. Students not only toured companies to understand varying engineering fields but female high school juniors and seniors had the unique opportunity to learn about the advantages and challenges of being in a male dominated career. Representation from local colleges also provided students with information on how to select a college and what to expect in their first year.
- MVP worked with Joy Global in a **rapid response to more than 200 layoffs**. MVP reached out to Valley businesses to connect workers to employment opportunities. Badger Railing has already hired several people.
- MVP, Havenwoods, and the Harbor District met to discuss common workforce issues and areas of potential collaboration. These meetings will continue as we build our partnership and share best practices on workforce development programming and other projects.
- A **Workforce Initiatives Advisory Team** was created to provide guidance to the Workforce concerns throughout the Menomonee Valley and to advise on ways to build partnerships for place-based workforce development solutions, and direct employers to appropriate available resources. The team has representatives from Employ Milwaukee, Milwaukee7, Milwaukee Area Technical College and the Workforce Funding Alliance.
- Staff is meeting with workforce advisors and agencies throughout the region to learn what services exist and how MVP can be a valuable partner.

**Maintain a thriving, sustainable, urban district, which is home to manufacturing, entertainment and recreation.**

- Hundreds of volunteers participated in the **Menomonee Valley Earth Day Annual Clean-Up!** Volunteers helped to pick up trash, pull weeds, and marveled at the growth of Three Bridges Park. Over 300 bags of garbage were collected.
- MVP did not produce a calendar this year due to other marketing priorities. A survey was created to collect feedback that will help us understand what aspects people value about marketing the Valley and help us understand additional ways to bring awareness, excitement and activation of our trails and parks.
- Thanks to the continued partnership of area businesses that participate in our **Stew Crew** program, we are able to keep the areas of the Hank Aaron State Trail beautiful all year long. Team members from eight area businesses each volunteer 2-3 hours a month cleaning, weeding and maintaining their adopted area.
- The **Valley Health & Wellness Committee** has been transitioned to UEC so MVP staff can focus on our strategic plan. This is a beneficial relationship for UEC because it helps build their connections with businesses.
- MVP participated in **Doors Open**, providing a history tour of the Menomonee Valley Community Park, Three Bridges Park, and the Menomonee Valley Industrial Center.
- The Menomonee Valley participated in the **Wisconsin Bike to Work Week** by setting up commuter stations along the Hank Aaron State Trail at the Valley Passage, near the Urban Ecology Center and Three Bridges Park to welcome bikers and share more information about the trail and the park.

- The Friends of the **Hank Aaron State Trail's 16<sup>th</sup> Annual Hank Aaron State Trail Run/Walk** drew nearly 1,600 participants. It was a great day and provided the opportunity for many runners and walkers to explore Three Bridges Park.
- The **Menomonee Valley Business Association** continues to be a great networking and resource tool for Valley businesses. These events are held five times a year and provide an opportunity to educate Valley businesses on local services.
- All Hands Boatworks has an agreement in place to lease land at the MRF facility. This organization will be providing free community rowing programs throughout the summer. They are a welcomed addition to help activate the river at Emmer Lane.
- The **Menomonee Valley Public Safety** committee continues to meet quarterly. In 2015 both police Districts received new captains and therefore we worked hard to rebuild and reestablish our relationships and develop new procedures to policing the area. Crane is working on the initial phases of a Menomonee Valley evacuation plan.
- Graffiti still seems to have the highest concentration on St. Paul Ave. and there continues to be a large graffiti presence on public infrastructure such as the bridges in Three Bridges Park. We have a great relationship with the Department of Neighborhood Services which helped us to maintain the area and remove the graffiti in a timely fashion.
- MVP partnered with Historic Milwaukee to develop a **bicycle tour** of the Menomonee Valley. Four bike tours were held in this fiscal year.
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**Provide for effective transportation access and other infrastructure with a current focus on the reconstruction of I-94.**

- The I-94 design has been delayed because it was not included in the State's most recent biannual budget. MVP has used this time to be proactive in planning the approach and building support. We are working to mobilize key businesses to lobby state legislators encourage them to reinstate future funding for bike/ped and other transportation programs important for both the I-94 project and other statewide projects.
- City Lights Brewing Company will sponsor the Valley's first Bublr Bike station, which will help grow this valuable transportation resource for Valley businesses.
- A series of meetings were held to ensure that Valley businesses understood the new floodplain maps proposed by MMSD for the Valley East of Falk. It overlapped with much of the area intended for development in the Valley 2.0 plan.
- MVP met with Ghassan Korban and business leaders to convey concerns with both parking and employees' ability to get to work. MVP is partnering with MetroGo on their last mile project. Like suburban business parks, the Valley has issues with workers' ability to access the last mile to the workplace. MetroGo will assist with developing a survey similar to one they used for Oak Creek, and MVP will administer it. MetroGo will analyze data, map employers, job creation, wages, and help determine if transit solutions exist.

**Ensure MVP has the organizational capacity to achieve its long-term goals.**

- Michelle Kramer, our 2014-2016 Marquette Trinity Fellow was promoted to Director of Marketing and Business Development. The strategic plan includes a heavy focus on planning, predevelopment, and business recruitment. Michelle will target the redevelopment of St. Paul Avenue and growth of its design and décor cluster and redevelopment of vacant land on the Valley's east end and growth of the food and beverage manufacturing cluster. She will also work on strategies that will market and bring awareness to the Valley brand.

Appendix D: Certified Audit (attached)

### BID #26 (Menomonee Valley) Board Member Sheet

**Board Organization:** 8 members, the majority of members shall be owners or occupants of property within the District. Any non-owner or non-occupant appointed to the Board shall be a resident of the City of Milwaukee. The Board shall elect its Chairperson from among its members. 3 year terms

<u>Board Member</u>	<u>Title</u>	<u>Start Date</u>	<u>End Date</u>
Daniel Sterk	Member	12/21/2015	12/21/2018
David Brien	Member	11/16/2015	11/16/2018
Jeff Morgan	Member	10/2/2013	10/2/2016*
John Brennan III	Chair	11/8/2013	11/8/2016*
John Jennings	Treasurer	1/29/2015	1/29/2018
Joyce Koker	Member	10/13/2015	10/13/2018
Larry Stern	Vice-Chair	12/10/2015	12/10/2018
T. Arthur Downey	Member	10/15/2013	10/15/2016*

\*Currently undergoing Board Reappointment process

