

River View

Neighborhood Improvement District No. 10

River View

2022 Operating Plan

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I. Introduction

A. Background

In 2006, the state of Wisconsin enacted WIS. Stat. 66.1110 a legislative declaration created to give Wisconsin municipalities the power to establish one or more Neighborhood Improvement Districts (NIDs) within their communities. An assessment methodology was developed to allow the assessable residential and commercial properties within the geographic area to contribute to programs aimed at neighborhood lighting, distinctive signage, and pocket-parks enhanced public green spaces and other activities as approved by the NID board.

The Riverview Neighborhood Improvement District will be created in 2019, for the purposes of revitalizing and improving the neighborhood areas on Milwaukee's Northwest side location (see Appendix A). This document is the Operating Plan for the Riverview District. The NID proponents prepared the plan with technical assistance from the City of Milwaukee Department of City Development.

II. District Boundaries

Boundaries for the Riverview NID include the following.

- Properties that front 99th street from W Fountain Ave. north to West Lolita Ave.
- All properties that front W. Fountain Ave.
- All properties that front Parkland Court
- Properties that front North 94th street from W Fountain Ave. to North Riverview Court.
- All properties that front North Riverview Court
- Three properties on North Granville Road; 7910, 7906, and 7902

This configuration accounts for 57 individual lots that make up the Riverview NID.

III. Operating Plan

A. Plan Objectives

The objective of the Riverview NID is to do the following.

- 1) To maintain the common areas (including retention ponds), including snow and ice removal when needed, inside the Riverview NID boundaries.
- 2) To collaboratively work with the City of Milwaukee to implement a speed management system within the NID boundaries.
- 3) Continuing work on the clearing and beautification of common areas.

- 4) To assist with our planning of neighborhood socials and holiday events.

B. Activities for 2022

Principle activities that will be engaged in by the NID during the 2022 year of operation will include:

- 1) Maintenance and upkeep, to include lawn care and snow and ice removal, of common areas within the boundaries of the Riverview NID.
- 2) Installation of speed bumps within the boundaries of the NID.
- 3) Host two (2) neighborhood community building events.
- 4) Clear the second of our two common areas and begin the beautification work on the first area.

C. Expenditures - 2022

The following represents the 2022 budget for the Riverview NID.

Income

Source of Income	Amount	Total
53 residential – owner occupied properties	\$200 annual rate	\$10,600 51%
1 residential – rental properties	\$500 annual rate	\$500 5%
2 business properties Albertine House LLC	\$3,000 x 2	\$6,000 29%
1 business property Angel Heart House LLC	\$3,000	\$3,000 15%
		\$20,100

Expenditure	Amount
Common area clearing and beautification project	\$7,400
Common area mowing contract	\$5,000.00
Snow removal	\$1,200.00
Social activities	\$1,000.00
Financial review	\$500.00
Speed bumps	\$5,000
	\$20,100

D. Financing Method

The \$20,100 for the 2022 Riverview NID will be realized through the NID assessment (see Appendix B). The NID board, after receiving input from our residents, has prioritized expenditures and will continue to revise the budget as necessary to match the funds available.

E. Organization of Riverview NID Board

The elected Board of Directors represents a cross section of residents that make up the Riverview neighborhood.

Upon creation of the NID, the District shall hold annual meetings to elect directors to the district board ("board") consistent with terms of this subsection and the bylaws of the Riverview NID. 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 NID assessments.

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

State law requires the local legislative body must set the time and place for a meeting at which members of the board will be elected and shall publish a class 2 notice under Chapter 985 that contains the information. The notice shall specify that all individuals who either own or occupy real property within the neighborhood improvement district are eligible to serve on the board and vote at the election.

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

1. Board Size – To be set by the Common council but at least 5.
2. Composition – All board members shall be owners or occupants of property within the district. The number of board members who represent commercial and residential properties shall be set as close as possible to the proportion of each type of property to the total assessed value of all property in the District. The Board shall elect its Chairperson from among its members.
3. Term - Director's terms shall be for a period of one year. Directors may be re-elected.

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 adopt rules of order (“by laws”) to govern the conduct of its meetings.

F. Relationship to the Riverview Homeowners’ Association (HOA).

The NID shall be a separate entity from the Riverview HOA, notwithstanding the fact that members, officers, and directors of each may be shared. The HOA shall remain a private organization, not subject to the open meetings law, and not subject to the public record law except for its records generated in connection with the NID board. The HOA may, and it is intended, shall, contract with the NID to provide services to the NID, in accordance with this plan.

G. The NID is not authorized to hold or own property.

IV. **METHOD OF ASSESSMENT**

A. Assessment Rate and Method

It was proposed and agreed that the River View Neighborhood Improvement District will be using a varied assessment method consisting of a three-tiered assessment rate for each taxable property included within the NID boundaries.

The principle behind the assessment methodology is that residential - owner occupied properties should contribute at an equal amount while residential – rental properties should carry a greater level of burden because the owner is not physically available to contribute to the upkeep of the common property. Non-owner occupied business properties (assisted living facilities) will be assessed at a greater level to be determined annually by the voting members of the NID. Therefore, a varied assessment was selected as the basic assessment methodology for this NID.

The following 3-tiered assessment rate will be used to assess each taxable property.

Tier	Assessment Rate
Residential property – owner occupied	\$200 annually
Residential property - rental	\$500 annually
Assisted living facilities and other non-owner-occupied businesses	\$3,000 annually

V. PLAN AND ORDERLY DEVELOPMENT OF THE CITY

A. City Plans

In February 1978, the Common Council of the City of Milwaukee adopted a Preservation Policy as the policy basis for its Comprehensive Plan and as a guide for its planning, programming, and budgeting decisions. The Common Council reaffirmed and expanded the Preservation Policy in Resolution File Number 881978, adopted January 24, 1989.

The Preservation Policy emphasizes maintaining Milwaukee's present housing, jobs, neighborhoods, services, and tax base rather than passively accepting loss of jobs and population or emphasizing massive new development. In its January 1989 reaffirmation of the policy, the Common Council gave new emphasis to forging new public and private partnerships as a means to accomplish preservation.

The district is a means of formalizing and funding the public-private partnership between the City and property owners in the Riverview NID area and for furthering preservation and redevelopment in this portion of the City of Milwaukee. Therefore, it is fully consistent with the City's Comprehensive Plan and Preservation Policy.

B. City Role in District Operation

The City of Milwaukee has committed to helping private property owners in the district promote its development. To this end, the City expected to play a significant role in the creation of the Neighborhood Improvement District and in the implementation of the Operating Plan. In particular, the City will:

1. Provide technical assistance to the proponents of the district through adoption of the Plan and provide assistance as appropriate thereafter.
2. Monitor and, when appropriate, apply for outside funds that could be used in support of the district.
3. Collect assessments, maintain in a segregated account, and disburse the monies of the district.
4. Receive annual audits as required per sec. 66.1110 (4) (c) of the NID law.

5. Provide the board, through the Tax Commissioner's Office on or before June 30th of each Plan year, with the official City records and the assessed value of each tax key number with the district, as of January 1st of each Plan year, for purposes of calculating the NID assessments.

6. Encourage the State of Wisconsin, Milwaukee County, and other units of government to support the activities of the district.

VI. PLAN APPROVAL PROCESS

A. Public Review Process

The Wisconsin Neighborhood Improvement District law establishes a specific process for reviewing and approving proposed districts. Pursuant to the statutory requirements, the following process will be followed:

1. The Milwaukee City Plan Commission will review the proposed district boundaries and proposed Operating Plan and will then set a date for a formal public hearing.
2. The City Plan Commission will send, by certified mail, a public hearing notice and a copy of the proposed Operating Plan to all owners of real property within the proposed district. In addition, a Class 2 notice of the public hearing will be published in a local newspaper of general circulation.
3. The City Plan Commission will hold a public hearing, will approve or disapprove the Plan, and will report its action to the Common Council.
4. The Community and Economic Development Committee of the Common Council will review the proposed NID Plan at a public meeting and will make a recommendation to the full Common Council.
5. The Common Council will act on the proposed NID Plan.
6. If adopted by the Common Council, the proposed NID Plan is sent to the Mayor for his approval.
7. If approved by the Mayor, the NID is created.

B. Petition against Creation of the NID

The City may not create the Neighborhood Improvement District if, within 30 days of the City Plan Commission hearing, a petition is filed with the City containing signatures of: Owners of property to be assessed under the proposed initial Operating Plan having a valuation equal to more than 40% of the valuation of all property to be assessed under the proposed initial Operating Plan, using the method of valuation specified in the proposed initial Operating Plan; or Owners of property to be assessed under the proposed initial Operating Plan having an assessed valuation equal to more than 40%

of the assessed valuation of all property to be assessed under the proposed Operating Plan.

VII. FUTURE YEAR OPERATING PLAN

A. Annual Review of Operating Plan

Section 66.1110 (6)(b) of the NID law requires the board and the City to annually review and make changes as appropriate in the Operating Plan. Therefore, while this document outlines in general terms the complete development program, it focuses upon Year One activities, and information on specific assessed values, budget amounts, and assessment amounts are based on Year One conditions. Greater detail about subsequent years' activities will be provided in the required annual Plan updates.

The Riverview NID will continue to revise and develop the Operating Plan annually, in response to changing development needs and opportunities in the district, in accordance with the purposes and objectives defined in this initial Operating Plan.

In later years, the NID Operating Plan will continue to apply the assessment formula, as adjusted, to raise funds to meet the next annual budget. However, the method of assessing shall not be materially altered, except with the consent of the City of Milwaukee.

B. Amendment, Severability, and Expansion

This NID has been created under authority of Section 66.1110 of the Statutes of the State of Wisconsin. Should any court find any portion of this Statute invalid or unconstitutional its decision will not invalidate or terminate the NID and this NID Plan shall be amended to conform to the law without need of re-establishment.

Should the legislature amend the Statute to narrow or broaden the process of a NID so as to exclude or include as assessable properties a certain class or classes of properties, then this NID Plan may be amended by the Common Council of the City of Milwaukee as and when it conducts its annual Operating Plan approval and without necessity.

Appendix A
Aerial view of NID #10 boundaries



Appendix B

2022 Assessment Methodology and property exceptions

The Riverview NID is made up of 53 individual residences, 3 adult assisted living facilities, and one out lot. Each of the 51 owner-occupied residential units will be assessed at a rate of \$200 per unit. Two residential rental properties will be assessed at a rate of \$500 annually. The 3 assisted living facilities will be assessed at a rate of \$3,000 per property on an annual basis. The out lot is owned by one of the 51 individual homeowners and will be assessed as a separate unit.

The Riverview NID has no residential or business units that will be exempt from the funding formula.

Taxkey	Address	Owner1	Class	Assessm
790191000	7862 N 94TH ST	KEITH A ATKINSON	Residential	\$200
790192000	7850 N 94TH ST	EDGAR X JORDAN II	Residential	\$200
790193000	9505 W LOLITA AV	ERNEST C DAVIS	Residential	\$200
790194000	9521 W LOLITA AV	STEVEN W HOWELL	Residential	\$200
790195000	9603 W LOLITA AV	ANGELA M NOWAK	Residential	\$200
790196000	9640 W FOUNTAIN AV	ELIOT WASHINGTON	Residential	\$200
790197000	9660 W FOUNTAIN AV	AFISHETU ABU	Residential	\$200
790198000	9542 W PARKLAND CT	CLAVON BYRD	Residential	\$200
790199000	9524 W PARKLAND CT	REBECCA M FLEGNEO	Residential	\$200
790200000	9512 W PARKLAND CT	PHIL HANYARD	Residential	\$200
790201000	9502 W PARKLAND CT	GEORGE HINTON	Residential	\$200
790202000	9519 W PARKLAND CT	JOSEPH M MATTHES	Residential	\$200
790203000	9531 W PARKLAND CT	PRENTICE A STITH	Residential	\$200
790204000	9545 W PARKLAND CT	AH4RPTHREE LLC	Residential	\$500
790205000	9611 W PARKLAND CT	STELLA L PAYNE SANDE	Residential	\$200
790206000	9629 W PARKLAND CT	JASON WATERS	Residential	\$200
790207000	9707 W FOUNTAIN AV	MARK D WARMKE	Residential	\$200
790208000	9721 W FOUNTAIN AV	LEWIS JILES & EMILY JIL	Residential	\$200
790209000	9735 W FOUNTAIN AV	BERDIE L COWSER	Residential	\$200
790210000	9751 W FOUNTAIN AV	KENNETH L NOAKES	Residential	\$200
790211000	9803 W FOUNTAIN AV	BRANDON L HINES	Residential	\$200
790212000	9809 W FOUNTAIN AV	SUNDAY KEROBO	Residential	\$200
790213000	7804 N 99TH ST	FACELIA GLOVER	Residential	\$200
790214000	7818 N 99TH ST	EMMANUEL TAYLOR	Residential	\$200
790215000	7830 N 99TH ST	REGINALD NEWSON	Residential	\$200
790216000	7842 N 99TH ST	FELTON D CONLEY	Residential	\$200
790217000	9807 W LOLITA AV	WILLIE WILKS	Residential	\$200
790218000	9727 W LOLITA AV	LEANDER R WILLIAMS &	Residential	\$200
790219000	9715 W LOLITA AV	LAKEESHA JACKSON	Residential	\$200
790220000	9631 W FOUNTAIN AV	ALEX SMITH	Residential	\$200
790221000	9653 W FOUNTAIN AV	DEMOND A JUDE	Residential	\$200
790222000	9671 W FOUNTAIN AV	TONY O MAYS	Residential	\$200
790223000	9716 W FOUNTAIN AV	TODD W FIGARD	Residential	\$200
790224000	9740 W FOUNTAIN AV	EMANUEL J JACKSON	Residential	\$200
790225000	7871 N 94TH ST	PHOUA XIONG	Residential	\$200
790226000	7857 N 94TH ST	BRIAN M BARKOW	Residential	\$200
790227000	9530 W LOLITA AV	JOHN D SIROIS	Residential	\$200
790228000	9604 W LOLITA AV	BILLY COLE	Residential	\$200
790229000	9720 W LOLITA AV	LEON F PETERSON	Residential	\$200
790230000	7870 N 99TH ST	CHANTE DANTZLER	Residential	\$200
790231000	7882 N 99TH ST	CHANTE DANTZLER	Residential	\$200
790232000	7902 N GRANVILLE RD	TRACY D COBB	Residential	\$200
790233000	7906 N GRANVILLE RD	ANGEL HEART HOME LL	Residential	\$3,000
790234000	7910 N GRANVILLE RD	PETER J LEYRER	Residential	\$200
790235000	7909 N RIVER VIEW CT	THEODORE A PRINCE	Residential	\$200
790236000	7917 N RIVER VIEW CT	MARBIL HOME IMPROV	Residential	\$3,000

790237000	7925 N RIVER VIEW CT ALBERTINE HOUSE LLC	Residential	\$3,000
790238000	7933 N RIVER VIEW CT DOROTHY COWSER	Residential	\$200
790239000	7941 N RIVER VIEW CT TAWAU T SALEEM	Residential	\$200
790240000	7949 N RIVER VIEW CT ROBERT L KENDALL JR	Residential	\$200
790241000	7957 N RIVER VIEW CT TROY HAUGHTON	Residential	\$200
790242000	7950 N RIVER VIEW CT MICHAEL J BLEVINS	Residential	\$200
790243000	7942 N RIVER VIEW CT JEROME SMITH	Residential	\$200
790244000	7934 N RIVER VIEW CT GETHER MERCER	Residential	\$200
790245000	7926 N RIVER VIEW CT TERRON D BAKER	Residential	\$200
790246000	7918 N RIVER VIEW CT ELLEN SONO	Residential	\$200
790247000	7900 N RIVER VIEW CT JEROME E NICHOLS	Residential	\$200



River View

NID #10

ANNUAL REPORT 2021

River View Board of Directors –

- Keith Atkinson, Chairman
- Clavon Byrd, Vice-Chairman
- Dana Davis, Community Engagement
- Tamara Leyrer, Secretary
- Amanda Ward-Prince, Treasurer

NID Priorities –

- To enhance community aesthetic appeal through entrance monument installation, retention pond maintenance and care of common areas.
- Crime remediation and reduction.
- Celebration and Preservation of neighborhood diversity.
- Development of policies and procedure that allow for effective enforcement of deed restrictions and neighborhood covenants.
- Outreach to owners of rental properties to ensure that they and their tenants are aware and abide by neighborhood and aesthetic covenants.
- Communicate with nonresident business owners to ensure that they are aware and abide by neighborhood and aesthetic covenants.
- Facilitate and ensure familiarity and collaboration between neighbors.
- Effective maintenance and five-year certification of our Storm Water Management Plan.

Core Programs -

- Common Area Grass/foilage Maintenance
- Monument installation Cost and Maintenance
- Holiday/Community Events
- NID Administrative Cost
- NID Enhancement Projects
- Community Newsletter publication

River View Core Events -

- Neighborhood Block Party
- Neighborhood Clean-up
- Neighborhood Events Calendar

River View Major Project Competition for 2021 -

- Securing a common area maintenance contract to include the maintenance of neighborhood retention pond areas.
- Securing a snow removal contract.
- The installation of the second of the two new entrance monuments.
- Approval of new three-tiered assessment structure.
- Conducted the first annual community gathering in September that included a food truck, live music and other community activities.

Brian D. Joyce, CPA

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8/11/2021

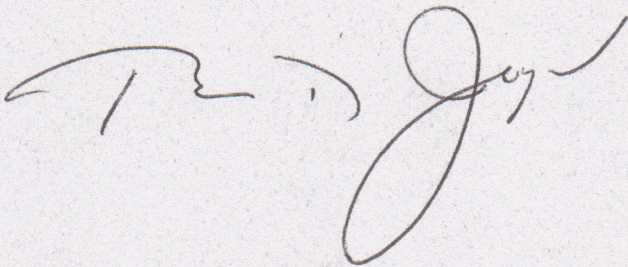
To: Mr Keith Atkinson

From: Brian Joyce, CPA

RE: River View HOA 2020

Please be advised I have reviewed the Operating Budget for the River View HOA as of 12/31/20. The scope of my review consisted of the comparison of all invoices with that of the bank statements for 2020 along with all income and deposits thereon. I found that the Budget as attached presents fairly the River View HOA as of 12/31/20.

Please advise if any other questions. Thank You!



River View HOA Operating Budget 2020

Updated 01/13/2021

	BUDGET	ACTUAL	SURPLUS/DEFICIT
SUMMARY			
Total Income	\$11,400.00	\$11,400.00	\$ -
Total Expenses	\$12,772.00	\$13,297.12	\$ (525.12)
Current Balance - Checking	\$14,480.42	\$13,297.12	\$ 1,183.30
BUDGET ACTUAL SURPLUS/DEFICIT			
INCOME			
OPERATING INCOME			
Assesment Income - optimal (57 homes x \$200)	\$11,400.00	\$11,400.00	\$ -
Late Fees	\$ -	\$ -	\$ -
Balance from 2019	\$ 3,080.42	\$ 3,080.42	\$ -
TOTAL	\$14,480.42	\$14,480.42	
EXPENSES			
OPERATING EXPENSES			
Accounting & Legal			\$ -
HOA Reinstatement Fee / Annual Report Filing		\$ 20.00	\$ 20.00
Stormwater Retention Plan			\$ -
Stormwater Retention (3 pond clearing)	\$ 3,500.00	\$ 3,500.00	\$ -
Insurance	\$ 500.00	\$ -	\$ (500.00)
Grounds Landscaping & Maintenance	\$ 3,200.00	\$ 3,935.00	\$ 735.00
Ground Supplies		\$ -	\$ -
Exterior Improvements & Repairs	\$ -	\$ -	\$ -
Web Hosting & Domains	\$ -	\$ -	\$ -
Neighborhood Watch Materials	\$ -	\$ -	\$ -
HOA Sign	\$ 5,572.00	\$ 5,842.12	\$ 270.12
Bank Fees	\$ -		\$ -
TOTAL	\$12,772.00	\$13,297.12	
OFFICE EXPENSES			
Office Supplies	\$ -	\$ -	\$ -
Printing	\$ -	\$ -	\$ -
Postage	\$ -		\$ -
TOTAL	\$ -	\$ -	\$ -
COMMUNITY ENGAGEMENT EXPENSES			
Celebrations	\$ -		\$ -
TOTAL	\$ -	\$ -	\$ -
TOTAL	\$12,772.00	\$13,297.12	