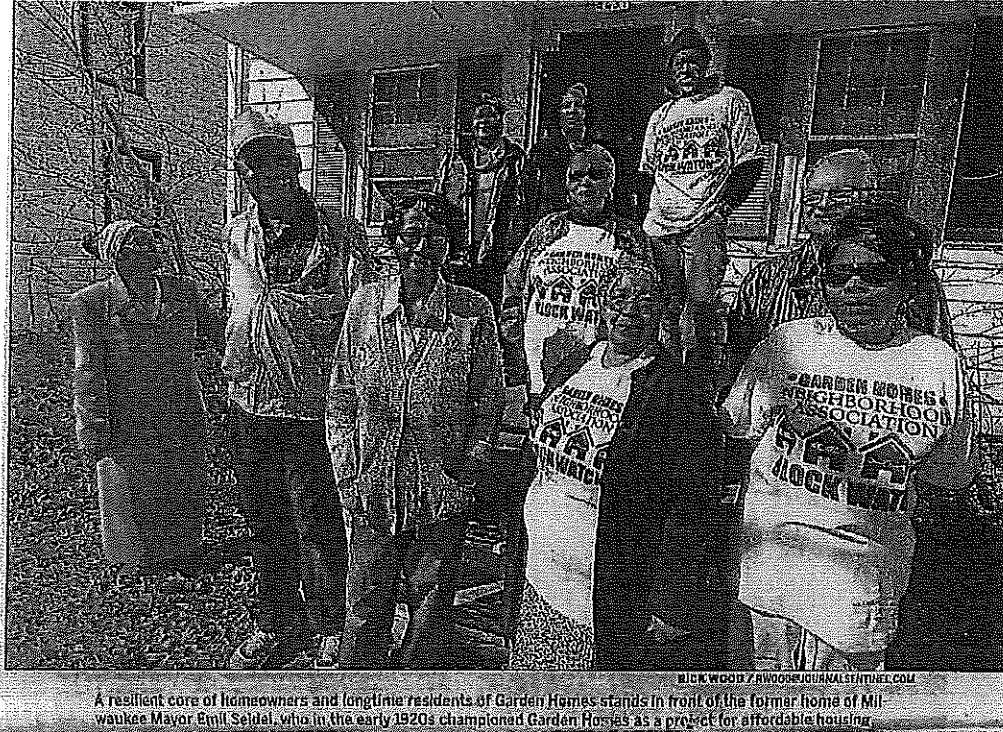


Historic Garden Homes  
Neighborhood Improvement District  
Year 1 Operating Documents



Garden Homes Neighborhood Association, Inc.

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Overview &  
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# Historic Garden Homes NID

## Overview

The Garden Homes Neighborhood Association, Inc., ongoing since 1972 and incorporated during 2012, has championed causes and developed projects that uplifted the historic district area, unified neighbors to experience community self-determination, impacted the sting of poverty and accentuated the proud history of the original Garden Homes Neighborhood and the people who live within the community served by the association. Since Wall Street's greed came home to roost in 2008 causing 30 families within a two-block radius of the Garden Homes Historic District to abandon their homes, the association has embarked on ardent and resilient projects to recapture the neighborhood, restore the time-honored values promoted by Mayors Emil Seidel and Daniel Hoan, and revive hope for all residents and other stakeholders that the neighborhood will not only survive but will also thrive. The Neighborhood Improvement District program will be one of those building blocks to beacon the association's prevailing efforts. The Historic Garden Homes Neighborhood Improvement District (HGH NID) will place an assessment of \$50 per unit per year on the existing residential units in the neighborhood and \$100 per commercial parcel to underwrite the following five community enrichment programs during 2017:

## Enrichment projects

1. No Home Left Behind – Home Renovation
2. The Lean, Clean Green Machine – Clean Neighborhood
3. An Eye for Safety- Security Cameras
4. Sowing Seeds for Victory – Home-Grown Gardens
5. Make the Right Moves – Chess in 2 schools

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Narrative

# **NARRATIVE**

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## 2017 OPERATING PLAN

### HISTORIC GARDEN HOMES NEIGHBORHOOD IMPROVEMENT DISTRICT

#### I. Introduction

##### A Background

In 2006 the State of Wisconsin, enacted Wis. Stat. §66.1110 a legislative declaration created to give Wisconsin municipalities (i.e., cities, villages and towns) the power to establish one or more Neighborhood Improvement Districts (NIDs) within their communities. An assessment methodology is developed to allow the assessable residential and commercial properties within the geographic area to contribute to programs aimed at neighborhood improvements and other activities as approved by the NID board. The ACT was drafted similar to the business improvement district statute.

The City of Milwaukee has received a petition from property owners which requests creation of a Neighborhood Improvement District for the purpose of revitalizing and improving the Garden Homes Historic District and surrounding blocks on Milwaukee's north side (see Appendix B). The NID law requires that every district have an annual Operating Plan. This document is the initial Operating Plan for the Historic Garden Homes Neighborhood Improvement District. The NID proponents prepared this plan with technical assistance from the City of Milwaukee Department of City Development.

##### B. Physical Setting

The boundary for the Historic Garden Homes Neighborhood Improvement District (HGH NID) encompasses the upper east 1/8<sup>th</sup> portion of the Garden Homes Neighborhood. Specifically, the boundary area is defined from W. Hampton Avenue at N. 2<sup>nd</sup> Street proceeding eastward on the southside of W. Hampton Avenue to N. Teutonia Avenue; proceeding southward on the westside of N. Teutonia Avenue to W. Roosevelt Drive; proceeding eastward on the northside of W. Roosevelt Drive to N. 2<sup>nd</sup> Street; and proceeding northward on the eastside of N. 2<sup>nd</sup> Street to end at W. Hampton Avenue. For a visual of the specific boundary, see Appendix C, Map.

Noteworthy, 100 of the District's 168 single-family dwellings comprise the Garden Homes Historic District built by Mayor Daniel Hoan in the early 1920s. The Garden Homes Historic District was the nation's first municipally-sponsored, community-owned housing project and a notable example of early 20th century city planning. After WWI the Milwaukee housing commission proposed a municipally-sponsored, low-cost, cooperative housing project to ease the local housing shortage and improve the quality of city life. The plan offered working-class tenants an opportunity to purchase equity in the project through a cooperative ownership plan. The project included setting aside land for playgrounds, recreation and community gardens.

Garden Homes was the only large-scale public development of detached single family and duplex homes ever built under a cooperative ownership plan in America. Today the homes in this district are private residences.

The City of Milwaukee, the Wisconsin Registry of Historic Places and the National Registry of Historic Places acknowledge the significance of the Garden Homes Historic District. For a specific Garden Homes Historic District visual, see Appendix D, Map.

The HGH NID is home to 330 families, three churches, eight businesses, a parochial school and one community-based organization, the Garden Homes Neighborhood Association, Inc., active in the community for 44 years. The longer-standing Garden Homes Evangelical Lutheran Church has anchored the neighborhood for over 75 years. The Powerhouse of Deliverance Church and the Alpha and Omega Church as well as the Garden Homes Lutheran School, one of the top elementary schools in Milwaukee, enhance the quality of life for the community. The neighborhood main shopping area at N. 2<sup>nd</sup> Street and

W. Atkinson Avenue is well-recognized as a highly-trafficked shopping strip that commands interest. The Northwest Side Community Development Corporation promotes a "green" program and a home-purchase program in the area. The 30th Street Industrial Corridor Corporation works to enhance the neighborhood's Garden Homes Park and promote broader-community development. Common Council President Ashanti Hamilton's "Strong Neighborhood" initiative focuses a great amount of attention and activity within the Garden Homes Historic District.

#### C. Principal Office and Registered Agent

The principal office and registered office of the HGH NID shall be 4468 N. 26th Street, Milwaukee, WI 53209. The registered agent of the HGH NID shall be Joe Bova.

## II. DISTRICT BOUNDARIES

Boundaries of the proposed district are shown on the map in Appendix C of this plan. A listing of the properties included in the district is provided in Appendix E. The actual boundary is depicted in section I.B. of this plan and the actual properties included are listed in Appendix E. In the event of a discrepancy, Appendix E shall control. The HGH NID may update Appendix E during each annual Operating Plan. The boundaries are herein referred to as "HGH NID area."

## III. PROPOSED OPERATING PLAN

### A. Plan Objectives

The objectives of the HGH NID are to a) provide assistance to property owners, b) create jobs in the area, c) fund community projects and d) impact poverty.

### B. Proposed Activities- Year One

Principal activities to be engaged in by the district during its first year of operation will include:

#### 1. **No Home Left Behind** – Home Renovation

No Home Left Behind, a home renovation and repair program, will market a home repair resource directory and provide up to five (5) \$1,000 property repair rebates.

The directory will list information about available grants, low-interest loans, tax credits and historicity-related information and processes and will be presented to property owners at no cost.

Further, the program will provide matching fund rebates of up to \$1,000 each for owners of four (4) residential properties and one (1) apartment building to help cover expenses for renovations and repairs. No income restrictions will be required for eligibility.

#### 2. **The Lean, Clean Green Machine**- Clean Neighborhood

Six (6) eager young adults, 17-23, with adult supervision will clean Garden Homes Park, street curbs, and some yards at abandoned properties in the NID area six times (every other Friday) late June to early September. Further, the crew will learn the values of recycling and "going green." All collected debris will be transported and discarded at the North Side Self-Help Center.

#### 3. **An Eye for Safety** – Security Cameras

Security cameras will be positioned in the Garden Homes Park and on W. Port Sunlight Way from N. 26th to N. 27th streets, areas of on-going illegal activities, to record what happens there 24/7. Recordings would be accessed after an alleged crime for use by the Milwaukee Police Department to lead to apprehension and prosecution.

4. **Sowing Seeds for Victory** – Home-Grown Gardens

The Garden Program will provide installation and start-up of three (3) raised garden projects on residential sites within the NID area. Victory Garden Initiative will be a collaborative partner providing technical expertise, guidance and when possible garden equipment and material. There will be no income requirements for participation. The Garden Program will add on at least two raised gardens each year. And,

5. **Make the Right Moves** – Chess in 2 schools

More than a game, chess will be taught to 44 children in the Garden Homes Evangelical Lutheran School, an elementary school in the District, and the MPS Lloyd Barbee Montessori School, an elementary school adjoining the District, in a 12-week course during the fall semester for each school.

Pursuant to the NID Statute, defined below, the local legislative body does not authorize the board to own real property in the operating year, but the Operating Plan may be amended in the future to allow for such ownership.

C. Proposed Expenditures – Year One

Proposed budget is attached as Appendix F. The HGH NID Board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available. Although the HGH NID board may change the budget, it must payoff any debt incurred on behalf of the HGH NID, including without limitation, debt incurred related to the certified mailing costs involved in establishing the HGH NID.

D. Financial Method

It is proposed to raise approximately \$17,300 through HGH NID assessments (see Appendix E). Funds to underwrite 50% expense for the security cameras will be garnered from area agencies and businesses. The HGH NID may seek private financing for programming for future operating years of the HGH NID.

E. Organization of NID Board

Upon creation of the HGH NID, the District shall hold annual meetings to elect directors to the District Board (the "Board") consistent with terms of this subsection and the bylaws of the HGH NID. The board's primary responsibility will be implementation of the 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 HGH NID assessments.

State law requires that the board be composed of at least five directors and that the all of the board directors 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 directors of the board will be elected, and shall publish a class 2 notice under Ch. 985 that contains the information. The notice shall specify that all individuals that either own or occupy real property within the neighborhood improvement district are eligible to serve on the board and vote at the election.

The HGH NID Board shall be structured in accordance with the Bylaws attached as Appendix G, which is consistent with the following:

1. Board size. . The Board shall have at least 5 members, the exact number of which is to be determined by the Common Council of the City of Milwaukee.



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. Appointments to the board shall be for a period of one year. Directors may be re-elected.
4. Elections. 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 Historic Garden Homes neighborhood improvement district are eligible to serve on the board and vote at the election.
5. Primary Responsibility. The NID board's primary responsibility is to implement the Historic Garden Homes NID Operating Plan. The board negotiates with service providers to carry out the Plan; to enter into various contracts/agreements; to monitor development activity; to update the Operating Plan annually and ensure district compliance with the provisions of applicable statutes and regulations.
6. Meetings. All meetings of the board shall be governed by the Wisconsin Open Meeting Law. This requires that NID submits two (2) copies of the public meeting notices to the Office of the City Clerk at least one week prior to the scheduled meeting.  
  
The board shall meet regularly, at least twice per year. The board shall adopt rules of order ("by laws") to govern the conduct of its meetings.
7. Record Keeping. Files and records of the board's affairs shall be kept pursuant to public record requirements per City of Milwaukee code 303-32.
8. Staffing. The board may employ staff and/or contract for staffing services pursuant to this Plan and subsequent modifications thereof. The board may also maintain an office for the District, which shall be located within the District.
9. Board Compensation. None.
10. Changes. Any changes in the Board size, composition or election methodology must be approved by a 3/5 majority of the entire board.

#### F. Relationship to Other Organizations

The HGH NID shall be a separate entity from the Garden Homes Neighborhood Association, Inc. (GHNAI), notwithstanding the fact that members, officers and directors of each may be shared. The GHNAI 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 with the HGH NID Board. The GHNAI may, and it is intended, shall, contract with the HGH NID to provide services to the NID, in accordance with this Plan.

#### **IV. METHOD OF ASSESSMENT**

##### **A. Assessment Rate and Method**

The principle behind the assessment methodology is that each property should contribute to the HGH NID in proportion to the benefit derived from the HGH NID. After consideration of other assessment methods, it was determined that for residential properties, the number of residential units was the characteristic most directly related to the potential benefit provided by the HGH NID. For commercial properties it was determined that a flat fixed fee was most appropriate. Therefore, a fixed assessment of \$50 per residential unit for residential properties was selected as the basic assessment methodology for residential properties in the HGH NID ("Residential Methodology"); and a fixed assessment of \$100 per commercial properties was selected as the basic assessment methodology for commercial properties in the HGH NID ("Commercial Methodology"). For properties that contain both residential units and commercial use, both methodologies shall apply.

All eligible, non-exempt properties within the NID district shall be assessed per the above-cited assessment methodologies.

As of November 13, 2015, the property in the proposed district has a total assessed value approximately \$13,374,300 and approximately 232 parcels. Appendix E shows the projected HGH NID assessment for each property included in the district.

The assessment assigned to each property based on this formula is herein referred to as "HGH NID Assessment." Any HGH NID Assessments related to a previous year or years may not be contested. The HGH NID Assessment will be as shown on the attached list. Any HGH NID Assessment to this Operating Plan may only be contested prior to approval and adoption of this Operating Plan by the City Council.

#### **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 Garden Homes Historic District and the adjoining broader Garden Homes Neighborhood and for furthering preservation and redevelopment in this portion of the City of Milwaukee. Therefore the HGH NID Operating Plan 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 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 separate 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 30<sup>th</sup> of each Plan Year, with the official City records and the assessed value of each tax key number with the district, as of January 1 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 the action to the Common Council.
4. The 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.

#### 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's hearing, a petition is filed with the City containing signatures of: Owners of property to be assessed under the proposed initial Operating Plan having a valuation equal to more than 50% 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 PLANS**

**A Phased Development**

It is anticipated that the HGH 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 purposes and objectives defined in the initial Operating Plan.

Sec. 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 values, budget amounts and assessment amounts are based on Year One conditions.

Greater detail about subsequent year's activities will be provided in the required annual Plan updates, and approved by the Common Council of such Plan updates shall be conclusive evidence of compliance with this Plan and the NID law.

**B. Amendment, Severability and Expansion**

This HGH NID has been created under the authority of Sec. 66.1110 of the Statutes of the State of Wisconsin ("NID Statute"). Should any court find any portion of this Statute invalid or unconstitutional its decision will not invalidate or terminate the HGH NID and this HGH NID Operating Plan shall be amended to conform to the law without need of reestablishment

Should the legislature amend the Statute to narrow or broaden the process of a NID so as to exclude or include as assessable properties a certain class or classes of properties, then the 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 to undertake any other act

**VIII. CONTRACTION WITH HGH NID**

Any contracting with the HGH NID shall be exempt from the requirements of Sec. 62.15, Wis. Stats. because such contracts shall not be for the construction of improvements or provision of materials. If HGH NID does contract for the construction of improvements or provisions of material, it shall follow the requirements of such statutes to the extent applicable. Further, the annual accounting required under Sec. 66.608(3)(c) Wis. Stats. shall be deemed to fulfill the requirements of Sec. 62.15(14) Wis. Stats. The HGH NID Board of Directors and the City of Milwaukee shall comply with the provisions of Sec. 66.60 before the City inserts assessments for this NID Plan onto the tax bills for the parcels assessed thereunder, only to the extent required by law, to create a lien on the parcels assessed. The HGH NID may provide grant support to organizations that include the cost of staff; however, the HGH NID shall not have employees directly and shall contract with a responsible third party for any administration of grant funds.

# Appendices