

# NEIGHBORHOOD IMPROVEMENT DISTRICT NO. 4

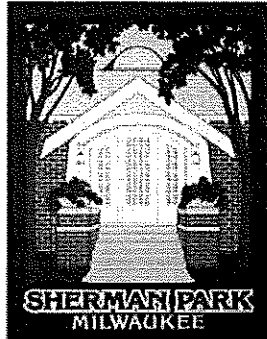
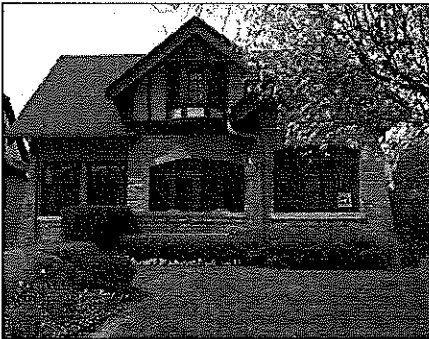
## Sherman Park Neighborhood Improvement District

### PROPOSED 2016 OPERATING PLAN

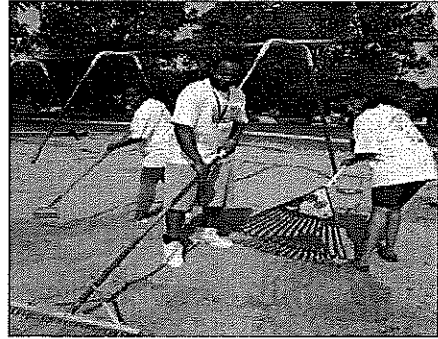
Draft 1

August 14, 2015

#### STRONG HOMES



#### STRONG COMMUNITY



### BUILDING OUR STRENGTH



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NEIGHBORHOOD IMPROVEMENT DISTRICT NO. \_\_  
**Sherman Park Neighborhood Improvement District**  
PROPOSED OPERATING PLAN

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**2016 OPERATING PLAN  
SHERMAN PARK NEIGHBORHOOD IMPROVEMENT DISTRICT**

**I. INTRODUCTION**

*A. Background*

In 2006, the State of Wisconsin signed into law the 2005 Wisconsin ACT 186, 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 community. 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 Sherman Park neighborhood area on Milwaukee's near west 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 Sherman Park 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 general boundaries for the Sherman Park Neighborhood Improvement District ("SP NID") are North Fifty-First Street to the west, North 38<sup>th</sup> Street to the east, West Burleigh Street to the north and West Meinecke Avenue to the south. For a specific boundary, see Appendix C.

Near the end of the nineteenth century and in the first decades of the twentieth, the area constituting the Sherman Park NID developed rapidly. That development proceeded from the southeast to the west and north as the Milwaukee city limits were extended westward beyond 35<sup>th</sup> Street to North 60<sup>th</sup> Street (Wauwatosa), and on the north to West Burleigh and beyond. Development was encouraged by extension of the street car lines to the west, the 1891 purchase of land well outside of City limits for Sherman Park itself, creation of Sherman Boulevard as part of the early plan to link city parks with landscaped boulevards, and by the construction of Washington High School in 1913 - quickly regarded as a premium institution throughout the region. Early aerial photos show that properties on Grant, a developer-created boulevard, and Sherman Boulevards tended to fill in later than properties on either side. Commercial development was concentrated along Lisbon and North Avenues and Center and Burleigh Streets.

Though blocks in the Sherman Park NID are on a fairly regular grid, street widths and lot sizes vary considerably. Lot sizes vary, ranging from 30' by 120' in the south and eastern areas and 50' by 130' on the west side of Sherman to 50' by 160' lots on a parallel stretch of blocks between Sherman and Grant Boulevards. Most properties west of 35<sup>th</sup> Street are said to constitute automobile suburbs in that the provision for private garages to store personal vehicles was an automatic feature. Of these, many were

built to match the style and materials of the home. Home construction has ranged from clapboard-sided frame and stucco or wood shingle over brick (bungalow styles) to all brick veneer or lannon stone. To date, there are few apartment buildings. The primary forms of housing in the NID are single family residences and unit over unit duplexes.

Many homes in the NID have architectural merit and were frequently individually designed by architects. These are most likely, though not exclusively, found on the 2500 block on North 47<sup>th</sup> Street, which is on the Milwaukee Historic Registry, and on Sherman and Grant Boulevards, both of which are on the local and National Historic Registers. Improvements in these latter districts are eligible for Preservation Tax Credits.

The SP NID is also home to a number of businesses and institutions including Hadley Terrace, the Mary Ryan Boys & Girls Club, and Washington High School.

### *C. Principal Office*

The Principal Office and Registered Office of the SP NID shall be the Sherman Park Community Association, 3526 West Fond du Lac Avenue, Milwaukee, WI 53216.

## **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 D. The description in Section I. B is a general description of the boundary; the actual boundary is depicted on Appendix C and the actual properties included are listed in Appendix D. In the event of a discrepancy, Appendix D shall control. The SP NID may update Appendix D during each annual Operating Plan. The Boundaries are herein referred to as "SP NID Area."

## **III. PROPOSED OPERATING PLAN**

### *A. Plan Objectives*

The objective of the SP NID is to (a) provide assistance to homeowners and (b) to fund community improvement projects in order to eliminate blight, stabilize the housing stock, and otherwise enhance the SP NID.

### *B. Proposed Activities - Year One*

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

#### 1. Assistance to Homeowners

- a. Create a grant fund ("Grant Fund") which will provide financial assistance to home owners in the SP NID Area through modest grants (e.g. \$50 - \$5,000 each) to make the following improvements to their properties: energy efficiency improvements, repairs to increase water conservation, repairs to the structural condition of the property (including roof

repairs), safety improvements (including lighting, fencing and garages), plumbing, electrical, and heating improvements, repairs that are essential for bringing properties into compliance with city building codes and repairs to increase the curb appeal of property (“Improvements”).

- b. An initial overview of grants to be made from the Grant Fund is attached as Appendix M. The Board of Directors of the SP NID may at any time amend the amount of each grant, the number of grants, and any qualifying criteria.

## 2. Fund Community Improvement Projects

- a. Sustain the work of existing neighborhood organizations, including, but not limited to, Hadley Residents Council, the Sherman Park Community Association, Uptown Crossing, and the 38<sup>th</sup> to 41<sup>st</sup> Street Block Group.
- b. Each neighborhood organization, block club, or group of residents shall develop a work plan that includes community improvement projects which may include, for example, advertising material for the neighborhood, providing resource materials to residents, hosting community events, beautification projects, etc.
- c. Projects will be funded to the extent funds are available by action of the SP NID Board of Directors.

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

### C. *Proposed Expenditures*

Proposed Budget attached as Appendix E. The SP NID Board of Directors shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

### D. *Financing Method*

It is proposed to raise approximately \$200,000 through SP NID assessments (see Appendix D). Funds may also be pursued from foundations and other available resources. The SP NID may seek private financing for programming secured by this year’s or future operating years of the SP NID. The SP NID Board of Directors shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

*E. Organization of NID Board*

Upon creation of the SP NID, the District shall hold annual meetings to elect Directors to the Board consistent with terms of this subsection and the bylaws of the SP 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 SP NID assessments.

State law requires (a) that the board be composed of at least five directors and that a majority of the board directors be owners or occupants of property within the district and (b) 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 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 SP NID Board be structured and operate in accordance with the Bylaws attached as Appendix L, which is consistent with the following:

1. Board Size: Minimum of seven (7) directors and up to nine (9) directors.
2. Composition: The Board shall consist of individuals who own or occupy residential property or mixed-use property (i.e. property with both commercial and residential uses). A minimum of 2/3 of the Directors shall be homeowners (owner-occupants) or residents that live within the SP NID.
3. Term: Terms for the members of the board shall be for a period of three years. Directors may be re-elected.
4. Compensation: None
5. Meetings: The Board shall adopt rules of order (by-laws) to govern the conduct of its meetings. The Board shall meet regularly, at least once every 3 months. A total of at least five (5) Board Members must be present for quorum in order for official decisions to be made. All meetings of the Board's affairs shall be kept pursuant to public records requirements.
6. Staffing and Office: The Board may employ staff and/or contract for staffing services pursuant to this Operating Plan and subsequent modifications thereof. The Board may also maintain an office for the District, which shall be located within the District.
7. Method of Electing Directors to District Board: An annual meeting at which directors of the Board will be elected shall be held on the first Tuesday of February of each year of the District's existence. Prior to the meeting, the City shall publish a Class 2 notice that contains the time and place of the annual meeting. The notice shall specify that all individuals who either own or



occupy real property within the District are eligible to serve on the Board and vote at the election.

8. Changes: Any change in the Board size, composition or election methodology must be approved by a two-thirds (2/3) majority of the entire Board.

*F. Relationship to other Organizations:*

The SP NID shall be a separate entity from the Sherman Park Community Association (SPCA), notwithstanding the fact that members, officers and directors of each may be shared. The SPCA shall remain a non-profit 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 SP NID Board. The SPCA may and, it is intended, shall contract with the SP 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 SP NID in proportion to the benefit derived from the SP 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 SP NID.

Therefore, a fixed assessment of \$50 per dwelling unit was selected as the basic assessment methodology for properties in the SP NID. Mixed-use properties and multi-family dwellings (residences with two or more dwelling units) shall be assessed \$50 per unit to a maximum of \$500. Properties in the area which fall within pre-existing Business Improvement Districts (BIDs) are omitted from the SP NID.

Maintaining an equitable relationship between the SP NID 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 \$500 per parcel will be applied.

As of March 13, 2013, the property in the proposed district had approximately 2,833 parcels with a total of assessed value of approximately \$195,753,000. Appendix D shows the projected SP NID assessment for each property included in the district.

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

*B. Excluded and Exempt Property*

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

1. In accordance with the interpretation of the City Attorney regarding Wis. Stats. Section 66.1110(7)(a), property exempt from general real estate taxes has been excluded from the District. Owners of tax exempt property adjoining the District and expected to benefit from District activities will be asked to make a financial contribution to the District on a voluntary basis. Those tax exempt properties adjoining the District which are later determined no longer to be exempt from general property taxes shall automatically become included within the District and subject to assessment under any current operating plan without necessity to undertake any other act.

## **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 Sherman Park neighborhood 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 is 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 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's hearing, a petition is filed with the City containing signatures of:

- a) 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
- b) 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 SP 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.

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

In later years, the SP 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 SP NID has been created under authority of Section 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 SP NID and this SP 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 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 to undertake any other act.

**VII. Contraction with SP NID**

Any contracting with the SP 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 the SP 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 SP 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 SP NID may provide grant support to organizations that include the cost of staff; however, the SP NID shall not have employees directly and shall contract with a responsible third party for any administration of grant funds.

## **Appendices**

Appendix A – NID Statute: Wis. Stats. 66.1110

Appendix B - Petition for creation of the SP NID (INTENTIONALLY OMITTED)

Appendix C - Proposed Boundary Map

Appendix D - Property & Assessment List

Appendix E - 2015 Operating Budget

municipality shall obtain an additional independent certified audit upon termination of the business improvement district.

(d) Either the board or the municipality, as specified in the operating plan as adopted, or amended and approved under this section, has all powers necessary or convenient to implement the operating plan, including the power to contract.

(4) All special assessments received from a business improvement district and all other appropriations by the municipality or other moneys received for the benefit of the business improvement district shall be placed in a segregated account in the municipal treasury. No disbursements from the account may be made except to reimburse the municipality for appropriations other than special assessments, to pay the costs of audits required under sub. (3) (c) or on order of the board for the purpose of implementing the operating plan. On termination of the business improvement district by the municipality, all moneys collected by special assessment remaining in the account shall be disbursed to the owners of specially assessed property in the business improvement district, in the same proportion as the last collected special assessment.

(4m) A municipality shall terminate a business improvement district if the owners of property assessed under the operating plan having a valuation equal to more than 50% of the valuation of all property assessed under the operating plan, using the method of valuation specified in the operating plan, or the owners of property assessed under the operating plan having an assessed valuation equal to more than 50% of the assessed valuation of all property assessed under the operating plan, file a petition with the planning commission requesting termination of the business improvement district, subject to all of the following conditions:

(a) A petition may not be filed under this subsection earlier than one year after the date the municipality first adopts the operating plan for the business improvement district.

(b) On and after the date a petition is filed under this subsection, neither the board nor the municipality may enter into any new obligations by contract or otherwise to implement the operating plan until the expiration of 30 days after the date of hearing under par. (c) and unless the business improvement district is not terminated under par. (c).

(c) Within 30 days after the filing of a petition under this subsection, the planning commission shall hold a public hearing on the proposed termination. Notice of the hearing shall be published as a class 2 notice under ch. 985. Before publication, a copy of the notice together with a copy of the operating plan and a copy of a detail map showing the boundaries of the business improvement district shall be sent by certified mail to all owners of real property within the business improvement district. The notice shall state the boundaries of the business improvement district and shall indicate that copies of the operating plan are available from the planning commission on request.

(d) Within 30 days after the date of hearing under par. (c), every owner of property assessed under the operating plan may send written notice to the planning commission indicating, if the owner signed a petition under this subsection, that the owner retracts the owner's request to terminate the business improvement district, or, if the owner did not sign the petition, that the owner requests termination of the business improvement district.

(e) If after the expiration of 30 days after the date of hearing under par. (c), by petition under this subsection or subsequent notification under par. (d), and after subtracting any retractions under par. (d), the owners of property assessed under the operating plan having a valuation equal to more than 50% of the valuation of all property assessed under the operating plan, using the method of valuation specified in the operating plan, or the owners of property assessed under the operating plan having an assessed valuation equal to more than 50% of the assessed valuation of all property assessed under the operating plan, have requested the termination of the business improvement district, the municipality shall terminate the business improvement district on the date that

the obligation with the latest completion date entered into to implement the operating plan expires.

(5) (a) Real property used exclusively for residential purposes and real property that is exempted from general property taxes under s. 70.11 may not be specially assessed for purposes of this section.

(b) A municipality may terminate a business improvement district at any time.

(c) This section does not limit the power of a municipality under other law to regulate the use of or specially assess real property.

History: 1983 a. 184; 1989 a. 56 s. 258; 1999 a. 150 s. 529; Stats. 1999 s. 66-1109; 2001 a. 85.

**66.1110 Neighborhood improvement districts. (1) In this section:**

(a) "Board" means a neighborhood improvement district board elected under sub. (4) (a).

(b) "Chief executive officer" means a mayor, city manager, village president, or town chairperson.

(c) "Local legislative body" means a common council, village board of trustees, or town board of supervisors.

(d) "Municipality" means a city, village, or town.

(e) "Neighborhood improvement district" means an area within a municipality consisting of nearby but not necessarily contiguous parcels, at least some of which are used for residential purposes and are subject to general real estate taxes, and property that is acquired and owned by the board if the local legislative body approved acquisition of the property under sub. (4) (d) as part of its approval of the initial operating plan under sub. (3) (e).

(f) "Operating plan" means a plan adopted or amended under this section for the development, redevelopment, maintenance, operation, and promotion of a neighborhood improvement district.

(g) "Owner" means the owner of real property that is located within the boundaries, or the proposed boundaries, of a neighborhood improvement district.

(h) "Planning commission" means a plan commission under s. 62.23 or, if none exists, a board of public land commissioners or, if none exists, a planning committee of the local legislative body.

(2) An operating plan shall include at least all of the following elements:

(a) The special assessment method applicable to the neighborhood improvement district.

(b) The kind, number, and location of all proposed expenditures within the neighborhood improvement district.

(c) A description of the methods of financing all estimated expenditures and the time when related costs will be incurred.

(d) A description of how the creation of the neighborhood improvement district promotes the orderly development of the municipality, including its relationship to any municipal master plan.

(e) A statement as to whether the local legislative body authorizes the board to own real property and, if so, a description of the real property to be owned, the purpose of the ownership, and a statement of to whom the real property will be transferred if the neighborhood improvement district is terminated.

(f) A legal opinion that pars. (a) to (e) have been complied with.

(3) A municipality may create a neighborhood improvement district and adopt its operating plan if all of the following conditions are met:

(a) An owner of real property subject to general real estate taxes and located in the proposed neighborhood improvement district designated under par. (b) has petitioned the municipality for creation of a neighborhood improvement district.

(b) The planning commission has designated a proposed neighborhood improvement district and adopted its proposed initial operating plan.

(c) At least 30 days before creation of the neighborhood improvement district and adoption of its initial operating plan by the municipality, the planning commission has held a public hearing on its proposed neighborhood improvement district and initial operating plan. Notice of the hearing shall be published as a class 2 notice under ch. 985. Before publication, a copy of the notice, together with a copy of the proposed initial operating plan and a copy of a detail map showing the boundaries of the proposed neighborhood improvement district, shall be sent by certified mail to all owners of real property within the proposed neighborhood improvement district. The notice shall state the boundaries of the proposed neighborhood improvement district and shall indicate that copies of the proposed initial operating plan are available from the planning commission on request.

(d) Within 30 days after the hearing under par. (c), one of the following has not filed a petition with the planning commission protesting the proposed neighborhood improvement district or its proposed initial operating plan:

1. The owners of property to be assessed under the proposed initial operating plan having a valuation equal to more than 40 percent of the valuation of all property to be assessed under the proposed initial operating plan, using the method of valuation specified in the proposed initial operating plan.

2. The owners of property to be assessed under the proposed initial operating plan having an assessed valuation equal to more than 40 percent of the assessed valuation of all property to be assessed under the proposed initial operating plan.

(e) The local legislative body has voted to adopt the proposed initial operating plan for the neighborhood improvement district. The local legislative body shall publish a class 2 notice under ch. 985 regarding the meeting at which the local legislative body will vote on whether to adopt the proposed initial operating plan for the neighborhood improvement district. Before publication, a copy of the notice shall be sent by certified mail to all owners of real property within the proposed neighborhood improvement district.

(4) (a) 1. If the local legislative body adopts the proposed initial operating plan under sub. (3) (e), it shall determine the size of board, which shall consist of at least 5 members, all of whom shall own or occupy real property in the neighborhood improvement district.

2. The number of board members who represent commercial and residential property, respectively, shall be set by the local legislative body, as closely as possible, in the same proportion as is the aggregate valuation of commercial property in the neighborhood improvement district to the total assessed value of all property in the district, and the aggregate valuation of residential property in the district to the total assessed value of all property in the district.

3. The local legislative body shall 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 ch. 985 that contains this 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.

4. At the meeting, the individuals who own or occupy real property shall be divided into 2 groups. One group shall consist of those individuals who own or occupy commercial property, and one group shall consist of those individuals who own or occupy residential property. Each group shall elect from among its members the number of board members set to represent its group by the local legislative body under subd. 2.

5. Board members elected under subd. 4. shall serve a one year term, and may be reelected. Annually, the number of board members who represent commercial and residential properties, based on the calculation described in subd. 2., may be reallocated

by the local legislative body to the greatest extent possible to be consistent with the proportion described under subd. 2.

6. Annually, board members shall be elected under the procedures contained in this paragraph. If a vacancy occurs during the term of a board member, an individual shall be elected to fill the unexpired term of the member under the procedures contained in this paragraph.

(b) The board shall annually consider and may make changes to the operating plan, which may include termination of the plan, for the neighborhood improvement district. The board shall then submit the operating plan to the local legislative body for its approval. If the local legislative body disapproves the operating plan, the board shall consider and may make changes to the operating plan and may continue to resubmit the operating plan until local legislative body approval is obtained. Any change to the special assessment method applicable to the neighborhood improvement district shall be approved by the local legislative body.

(c) The board shall prepare and make available to the public annual reports describing the current status of the neighborhood improvement district, including expenditures and revenues. The report shall include an independent certified audit of the implementation of the operating plan obtained by the municipality. The municipality shall obtain an additional independent certified audit upon termination of the neighborhood improvement district.

(d) Either the board or the municipality, as specified in the operating plan as adopted, or amended and approved under this section, has all of the powers necessary or convenient to implement the operating plan, including the power to contract.

(5) All special assessments received from a neighborhood improvement district and all other appropriations by the municipality or other moneys received for the benefit of the neighborhood improvement district shall be placed in a segregated account in the municipal treasury. No disbursements from the account may be made except to reimburse the municipality for appropriations other than special assessments, to pay the costs of audits required under sub. (4) (c) or on order of the board for the purpose of implementing the operating plan. On termination of the neighborhood improvement district by the municipality, all moneys collected by special assessment remaining in the account shall be disbursed to the owners of specially assessed property in the neighborhood improvement district, in the same proportion as the last collected special assessment.

(6) (a) Subject to pars. (b) and (c), a municipality shall terminate a neighborhood improvement district if one of the following occurs:

1. The owners of property assessed under the operating plan having a valuation equal to more than 50 percent of the valuation of all property assessed under the operating plan, using the method of valuation specified in the operating plan, file a petition with the planning commission requesting termination of the neighborhood improvement district.

2. The owners of property assessed under the operating plan having an assessed valuation equal to more than 50 percent of the assessed valuation of all property assessed under the operating plan, file a petition with the planning commission requesting termination of the neighborhood improvement district.

3. The owners of property assessed under the operating plan having a valuation equal to more than 50 percent of the valuation of all property assessed under the operating plan fail to file a petition with the planning commission to continue the neighborhood improvement district within one year of the date on which the membership of the board changes from a majority which represents commercial properties to a majority that represents residential properties, or vice versa, as described under sub. (4) (a) 3.

(b) 1. A petition may not be filed under this subsection earlier than one year after the date on which the municipality first adopts the operating plan for the neighborhood improvement district.

2. On and after the date on which a petition is filed under par. (a) 1. or 2., or on and after the date on which a petition must be filed under par. (a) 3., neither the board nor the municipality may enter into any new obligations by contract or otherwise to implement the operating plan until the expiration of 30 days after the date of the hearing under subd. 3. and unless the neighborhood improvement district is not terminated under par. (c).

3. Within 30 days after the filing of a petition under par. (a) 1. or 2., the planning commission shall hold a public hearing on the proposed termination. Within 30 days after the deadline for filing a petition under par. (a) 3., passes, the planning commission shall hold a public hearing on the proposed termination. Notice of the hearing shall be published as a class 2 notice under ch. 985. Before publication, a copy of the notice, together with a copy of a detail map showing the boundaries of the neighborhood improvement district, shall be sent by certified mail to all owners of real property within the neighborhood improvement district. The notice shall state the boundaries of the neighborhood improvement district and shall indicate that copies of the operating plan are available from the planning commission on request and are posted in the building in which the municipality's governing body regularly holds its meetings.

4. Within 30 days after the date of the hearing under subd. 3., every owner of property assessed under the operating plan may send written notice to the planning commission indicating, if the owner signed a petition under par. (a) 1. or 2., that the owner retracts the owner's request to terminate the neighborhood improvement district, or, if the owner did not file or sign a petition under par. (a) 1. or 2., that the owner requests termination of the neighborhood improvement district under par. (a) 1. or 2.

5. Within 30 days after the date of the hearing under subd. 3., every owner of property assessed under the operating plan may send written notice to the planning commission indicating, if the owner signed a petition under par. (a) 3., that the owner retracts the owner's request to continue the neighborhood improvement district, or, if the owner did not file or sign a petition under par. (a) 3., that the owner requests continuation of the neighborhood improvement district under subd. 3.

(c) After the expiration of 30 days after the date of the hearing under par. (b) 3., and after adding any additions and subtracting any retractions under par. (b) 4. and 5., the municipality shall terminate the neighborhood improvement district on the date on which the obligation with the latest completion date entered into to implement the operating plan expires if the owners who have signed the petition requesting the termination of the neighborhood improvement district under par. (a) 1. or 2., constitute the required groups specified in par. (a) 1. or 2., or if an insufficient representation of owners, as described under par. (a) 3., petition to continue the neighborhood improvement district under par. (a) 3.

(7) (a) 1. Except as provided in subd. 2., any parcel of real property used exclusively for less than 8 residential dwelling units and real property that is exempted from general property taxes under s. 70.11 may not be specially assessed for purposes of this section.

2. In a 1st class city, real property that is exempted from general property taxes under s. 70.11 may not be specially assessed for purposes of this section.

(b) A municipality may terminate a neighborhood improvement district at any time.

(c) This section does not limit the power of a municipality under other law to regulate the use of or specially assess real property.

History: 2005 a. 186; 2009 a. 147.

66.1111 Historic properties. (1) DEFINITIONS. In this section:

(a) "Historic property" has the meaning given under s. 44.31 (3).

(b) "Political subdivision" means a city, village, town or county.

(2) ACQUISITION OF PROPERTY. A political subdivision may acquire by gift, purchase or condemnation any property right in historic property, whether the property is real or personal.

(3) OWNERSHIP, USE AND DISPOSITION OF PROPERTY. (a) A political subdivision may preserve or rehabilitate any historic property which it owns, construct buildings on that property, own and maintain that property for public purposes or lease or convey that property.

(b) If a political subdivision leases to another person historic property, the political subdivision shall include provisions in the lease which protect the historic character and qualities of that property. If the political subdivision conveys historic property, the political subdivision shall obtain a conservation easement under s. 700.40 to protect the historic character and qualities of the property.

(4) CONSIDERATION OF EFFECTS ON HISTORIC PROPERTIES. (a) In the earliest stage of planning any action related to the following, a political subdivision shall determine if its proposed action will affect any historic property which is a listed property, as defined under s. 44.31 (4), or which is on the list of locally designated historic places under s. 44.45:

1. Long-range planning for facilities development.
2. Any action under sub. (3).
3. Razing any historic property which it owns.

(b) A political subdivision shall notify the state historic preservation officer of any proposed action which it determines under par. (a) would affect any historic property.

(5) GRANTS. A political subdivision may make grants of funds to any public or private entity for the purpose of preserving or rehabilitating historic property.

History: 1987 a. 395; 1989 a. 31; 1999 a. 150 s. 88; Stats. 1999 s. 66.1111.

66.1113 Premier resort areas. (1) DEFINITIONS. In this section:

(a) "Infrastructure expenses" means the costs of purchasing, constructing, or improving parking lots; access ways; transportation facilities, including roads and bridges; sewer and water facilities; exposition center facilities used primarily for conventions, expositions, trade shows, musical or dramatic events, or other events involving educational, cultural, recreational, sporting, or commercial activities; parks, boat ramps, beaches, and other recreational facilities; fire fighting equipment; police vehicles; ambulances; and other equipment or materials dedicated to public safety or public works.

(b) "Political subdivision" means a city, village, town or county.

(c) "Premier resort area" means a political subdivision whose governing body enacts an ordinance or adopts a resolution under sub. (2) (a).

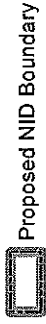
(d) "Tourism-related retailers" means retailers classified in the standard industrial classification manual, 1987 edition, published by the U.S. office of management and budget under the following industry numbers:

1. 5331 — Variety stores.
2. 5399 — Miscellaneous general merchandise stores.
3. 5441 — Candy, nut and confectionary stores.
4. 5451 — Dairy product stores.
5. 5461 — Retail bakeries.
6. 5541 — Gasoline service stations.
7. 5812 — Eating places.
8. 5813 — Drinking places.
9. 5912 — Drug stores and proprietary stores.
10. 5921 — Liquor stores.
11. 5941 — Sporting goods stores and bicycle shops.

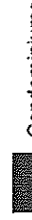
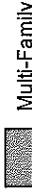
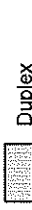
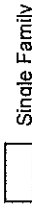


# Proposed NID Sherman Park Home Ownership

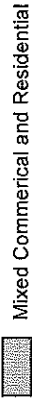
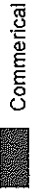
## Legend



### Residential



### Commercial



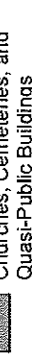
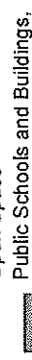
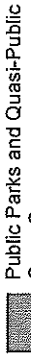
### Manufacturing, Construction, and Warehousing



### Transportation, Communications, and Utilities



### Public and Quasi-Public



### Vacant Land or Recent Taxley Change



Prepared by the Department of City Development  
23 July 2013  
Source: City of Milwaukee Information and  
Technology Management Division

**Appendix E**  
**2016 Operating Budget**

<u>Sources</u>	<u>2016</u>	<u>2015</u>	<u>2014</u>
NID Assessment on Properties	\$ 200,000.00	\$ 200,000.00	\$ 200,000.00
Total Projected Sources	<u>\$ 200,000.00</u>	<u>\$ 200,000.00</u>	<u>\$ 200,000.00</u>
<u>Uses</u>			
Home Repair Grants	\$ 136,000.00	\$ 136,000.00	\$ 116,500.00
Community Improvement Grants	\$ 16,500.00	\$ 16,500.00	\$ 12,000.00
Housing Specialist	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00
Administrative	\$ 7,500.00	\$ 7,500.00	\$ 7,500.00
Debt Service (Year One Only)	-	-	\$ 24,000.00
Total Projected Uses	<u>\$ 200,000.00</u>	<u>\$ 200,000.00</u>	<u>\$ 200,000.00</u>

# Sherman Park - Neighborhood Improvement District #4

2015 Annual Report

**SHERMAN PARK NID**

3526 W. FOND DU LAC AVE. | [SHERMANPARKNID@GMAIL.COM](mailto:SHERMANPARKNID@GMAIL.COM) | [@SHERMANPARKNID](https://www.instagram.com/SHERMANPARKNID)

2015



# Sherman Park - Neighborhood Improvement District #4

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2015 Annual Report

## 2015 Board of Directors

Nathan Stark, NID President  
Carmita Lampkins, NID Vice President  
Kiante Shields Anderson, NID Treasurer  
Kay Weisman, NID Secretary  
Ana Branderhorst  
Robert Briggs  
Jennifur Evans  
Cindy Juds  
Rodney Kenel

## **NID Mission:**

The Sherman Park Neighborhood Improvement District's (SP NID) primary mission is to provide an opportunity for residents to improve their neighborhood. The SP NID provides resident home owners with the means to gather funds by leveraging our neighborhood's many assets. The social and monetary capital gathered by the NID is directed towards promoting the success of the neighborhood as determined by its residents.



## 2015 Summary:

The past year has been busy for the Sherman Park Neighborhood Improvement District (SP NID). Due to a speedy turnaround on our funding this year, we had an early start for both the Home Improvement and the Community Improvement grant programs in an effort to hit the late spring construction season and maximize the effectiveness our neighborhood's resources. On February 3rd of 2015 the second annual meeting of the SP NID took place at Wheaton Franciscan St. Joseph's Hospital - Klieger Auditorium. An election was held to fill five vacancies in the board of directors with the charge of continuing to guiding the efforts of the Sherman Park NID. A slate of homeowners, residents, and non-resident property owners were nominated and from this group the SP NID board of directors was selected. By unanimous decision, the board again selected the Sherman Park Community Association to continue administering the highly successful SP NID Home Improvement and Community Improvement programs. Once the NID received its funding from the City of Milwaukee the money was immediately put to use as a catalyst to improve the neighborhood.

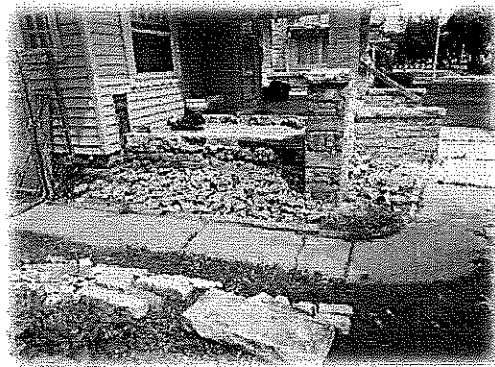
The following paragraphs explain the Home Improvement and the Community Improvement programs in greater detail and provide examples of the program's effectiveness in leveraging neighborhood assets.

### Home Improvement Grants:

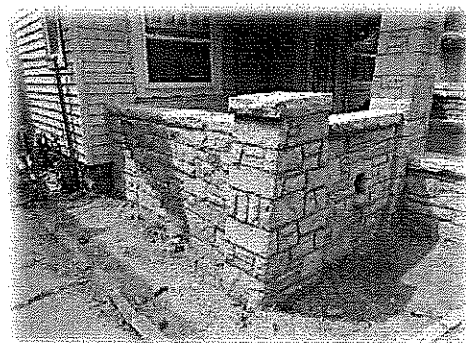
The Sherman Park NID Home Improvement Grants were made available beginning on March 21<sup>st</sup> of 2015. A notice was sent to each homeowner in the NID area announcing the kick-off. Homeowners could begin signing up at the Sherman Park Annual Home Resource Fair on that day, which included other programs, resources and contractors.

The Home Improvement Grants are up to \$5,000 with a sliding scale determining the match the homeowner is responsible for. Low-income homeowners (under 50% CMI) were not required to contribute a match outside of the initial \$50 assessment; homeowners with incomes between 50% and 120% CMI contributed a match of 25%; and those with incomes exceeding 120% CMI contributed a 50% match. Any costs over the \$5,000 grant were paid by the homeowner.

Forty homeowners received grants so far. The total amount of grants given out was over \$120,000 that leveraged an additional \$60,000. An additional \$25,000 is committed to residents who are still currently making repairs and improvements. This puts the total up to \$145,000. In addition, we were able to secure \$20,000 from the Housing Trust Fund to help extremely low income homeowners, those earning below 30% CMI, to help repair roofs. The NID approved \$20,000 to match that amount by moving



Before and After Porch Repair



funds from the Community Improvement Projects to the home improvement grants. The total in home improvement grants rises to over \$200,000 including the Housing Trust Fund.

There is an additional \$16,000 in an Emergency Repair Reserve Fund that is for non-functioning furnaces during the winter months. These funds are available beginning on October 1<sup>st</sup>.

The NID home improvement program benefits Sherman Park residents in many ways by:

- Providing funding for repairs and improvements that keep homes well maintained.
- Proactively addressing repairs before they turn into major repairs.
- Assisting with emergency repairs, i.e. furnace, water heater, to be done quickly.
- Assisting low and moderate income homeowners in making repairs and improvements they might not be able to afford.
- Improving the appearance of homes in the neighborhood
- Reinforcing commitment for homeowners to stay in the neighborhood and the city.
- Stabilizing and increasing property values.
- Home Improvement Program incentives leverage additional private investment by homeowners participating in these programs.



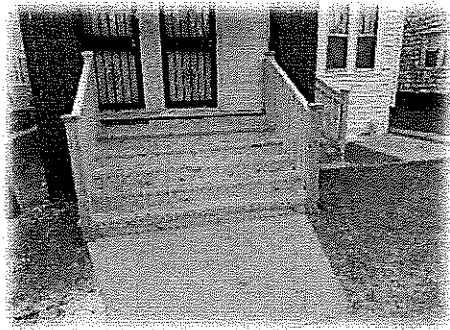
Before and After Roof Repair







Before and After Porch Repair



## Community Improvement Grants:

The Community Improvement Projects funded a back-to-school event that was organized by the 2800 block of North 36<sup>th</sup> Street. The event was to encourage neighbor's fellowship with each other. There are also issues with vacant boarded properties on their block that they want to address. The event included games, music, school supplies and food. Up to Five Hundred dollars was made available Sherman Park NID CIP funds to purchase school supplies. Neighbors contributed \$250 for food for the event.

Other CIP funds are earmarked for Securing our Seniors (SOS), a program designed to support older adults who choose to live in their homes as they age. Community individuals are trained to walk through the houses looking for places in the home where someone intent either on harming an older adult, burglarizing their home, or committing a crime against the senior might gain entry. After homes are assessed doors and window guards are installed. The NID funds are being used for these doors and windows. The senior homeowners matched this amount. At this time no CIP funds have been spent.

