

BUSINESS IMPROVEMENT DISTRICT NO. 31

Havenwoods

OPERATING PLAN

2021

I. INTRODUCTION

A. Background

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

On November 5, 2003, the Common Council of the City of Milwaukee approved the creation of Business Improvement District No. 31 (“BID”) and the initial Operating Plan for the BID. The objective of the initial Operating Plan of the BID is revitalizing and improving the Havenwoods business area on Milwaukee's far northwest side. The BID law requires that every district have an annual Operating Plan. This document is the Operating Plan for the BID for 2021 which proposes a continuation of the initial BID Operating Plan. Therefore, it incorporates by reference the initial Operating Plan as adopted by the Common Council of the City of Milwaukee.

B. Physical Setting

The physical setting of the BID District consists of industrial and retail businesses.

II. DISTRICT BOUNDARIES

Boundaries of the BID district are shown on the map in Appendix B of this plan. A listing of the properties included in the district is provided in Appendix C.

The boundaries include industrial and retail businesses while excluding the optimum amount of residential properties. The boundaries go from W. Silver Spring Drive to W. Good Hope Road. The boundaries east and west vary throughout the district. The most easterly boundary is N. 51st St. and the most westerly boundary is N. 77th St. Please refer to the attached map for exact boundaries

III. PROPOSED OPERATING PLAN

A. Plan Objectives

The objective of the BID is to market the industrial and the retail corridor to attract more businesses to the Havenwoods Neighborhood. Additional objectives include neighborhood revitalization, community organizing, and increased safety.

The anticipated result of forming this BID and improving the business corridors will be the creation of family supporting jobs and increase tax revenue for the City of Milwaukee.

Additional objectives include:

- Providing economic development support to the district.
- Developing real estate marketing strategies

- Providing advocacy at City, State and Federal levels.
- Seek additional funding mechanisms for activities outlined below.

B. Proposed Activities

These proposed activities will result in enhanced neighborhood image and safety, increased investment and increased property values.

Principle activities to be engaged in by the district in 2021 will include:

- a. Market the Havenwoods business community to developers, realtors and various investors for the potential for new industry.
- b. Promote Façade, Sign and Landscape Grant programs for Havenwoods commercial building owners.
- c. Promote and assist with commercial property improvements via grant programs
- d. Serve as Liaison between city service providers such as DNS, Milwaukee Police and DPW.
- e. Build the Employer Assisted Homeownership Program
- f. Liaison with owner of private and public property to encourage quality maintenance of said property.
- g. Liaison with economic development programs from public and private institutions.
- h. Explore better transit options such as extended bike paths and mass transit options
- i. Support HEDC Initiatives such as:
 - 1) Promote Homeownership
 - 2) Participate in quality of life initiatives
 - 3) Crime Prevention
 - 4) Seek out partners to deliver Workforce Development services

C. Proposed Expenditures

The Board has established priorities for expenditures based on objectives of the BID. Grants may be awarded to the partnering organization (Havenwoods Economic Development Corporation) to implement the plan to achieve the BID's objectives.

Assessment for 2021	\$211,864.00
Carry Over	\$170,000.00
Total:	\$381,864.00
Expenses	
Administrative Services to HEDC	\$100,000.00
Accounting/Audit services	\$4,000.00
D&O Insurance	\$1,800.00
Liability Insurance	\$3,200.00
Business Assistance Grants (facades, security, signs, landscape)	\$35,000.00
Retail Corridors Beautification, Maintenance and planters	\$23,000.00
Employer Assisted Homeownership	\$30,000.00
Havenwoods Ambassadors Program	\$42,000.00
Future Development/Acquisition	\$42,864.00
Contingency	\$100,000.00
Total Expenses:	\$379,000.00

D. Finance Method

It is proposed to raise \$211,864.00 through BID assessments (see Appendix C). Block Grant funding of \$47,000.00, \$40,000.00 from private fundraising will assist in leveraging the activities of the BID. The BID Board shall have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available. The total property value for BID #31 is \$ 208,194,900.00

E. Organization of BID Board

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

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

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

1. Board Size – Seven
2. Composition – The majority members shall be owners or occupants of property within the district. Any non-owner or non-occupant appointed to the board shall be a resident of the City of Milwaukee. The board shall elect its Chairperson from among its members.
3. Term - Appointments to the board shall be for a period of three years except that initially two members shall be appointed for a period of three years, two members shall be appointed for a period of two years, and one member shall be appointed for a period of one year.
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 Havenwoods Economic Development Corporation.

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

IV. METHOD OF ASSESSMENT

A. Assessment Rate and Method

This describes the assessment method most commonly used by Milwaukee BIDs. Other methods are possible. DCD staff can assist in developing other methods to fit the proposed BID's circumstances.

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

However, maintaining an equitable relationship between the BID assessment and the expected benefits requires an adjustment to the basic assessment method. To prevent the disproportional assessment of a small number of high value properties, a maximum assessment of \$7,000 for retail parcel and a maximum assessment of \$5,000 per industrial parcel will be applied. A minimum of \$400.00 will be required of retail parcels and \$300.00 for industrial parcels.

This plan proposes to assess the property in the district at a rate of .12% of assessed value per commercial property.

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

B. Excluded and Exempt Property

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

1. State Statute 66.1109(1) (f) 1m: The district will contain property used exclusively for manufacturing purposes, as well as properties used in part for manufacturing. These properties will be assessed according to the method set forth in this plan because it is assumed that they will benefit from development in the district.
2. State Statute 66.1109(5) (a): Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix C, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding State Statute 66.1109(1) (b), property exempt from general real estate taxes has been excluded from the district. Privately owned tax-exempt property adjoining the district and which is expected to benefit from district activities may be asked to make a financial contribution to the district on a voluntary basis.

V. RELATIONSHIP TO MILWAUKEE COMPREHENSIVE 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 Havenwoods business 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 Business 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. 66.1109 (3) (c) of the BID 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 BID assessments.
6. Encourage the State of Wisconsin, Milwaukee County and other units of government to support the activities of the district.

VI. FUTURE YEAR OPERATING PLANS

A. Phased Development

It is anticipated that the BID 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 66.1109 (3) (a) of the BID 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, information on specific assessed values, budget amounts and assessment amounts are based solely on current 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 BID law.

In later years, the BID 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 BID has been created under authority of Section 66.1109 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 BID and this BID 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 BID so as to exclude or include as assessable properties a certain class or classes of properties, then this BID 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. This is specifically authorized under Section 66.1109(3)(b).

APPENDICES

- A. STATUTE
- B. DISTRICT BOUNDARIES MAP
- C. 2021 PROJECTED ASSESSMENTS

66.1109 Business improvement districts.

(1) In this section:

- (a) "Board" means a business improvement district board appointed under sub. (3) (a).
- (b) "Business improvement district" means an area within a municipality consisting of contiguous parcels and may include railroad rights-of-way, rivers, or highways continuously bounded by the parcels on at least one side, and shall include parcels that are contiguous to the district but that were not included in the original or amended boundaries of the district because the parcels were tax-exempt when the boundaries were determined and such parcels became taxable after the original or amended boundaries of the district were determined.
- (c) "Chief executive officer" means a mayor, city manager, village president or town chairperson.
- (d) "Local legislative body" means a common council, village board of trustees or town board of supervisors.
- (e) "Municipality" means a city, village or town.
- (f) "Operating plan" means a plan adopted or amended under this section for the development, redevelopment, maintenance, operation and promotion of a business improvement district, including all of the following:
 - 1. The special assessment method applicable to the business improvement district.
 - 1m. Whether real property used exclusively for manufacturing purposes will be specially assessed.
 - 2. The kind, number and location of all proposed expenditures within the business improvement district.
 - 3. A description of the methods of financing all estimated expenditures and the time when related costs will be incurred.
 - 4. A description of how the creation of the business improvement district promotes the orderly development of the municipality, including its relationship to any municipal master plan.
 - 5. A legal opinion that subds. 1. to 4. have been complied with.
- (g) "Planning commission" means a plan commission under s. 62.23, or if none a board of public land commissioners, or if none a planning committee of the local legislative body.
- (2) A municipality may create a business improvement district and adopt its operating plan if all of the following are met:
 - (a) An owner of real property used for commercial purposes and located in the proposed business improvement district designated under par. (b) has petitioned the municipality for creation of a business improvement district.
 - (b) The planning commission has designated a proposed business improvement district and adopted its proposed initial operating plan.
 - (c) At least 30 days before creation of the business improvement district and adoption of its initial operating plan by the municipality, the planning commission has held a public hearing on its proposed business 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 business improvement district shall be sent by certified mail to all owners of real property within the proposed business improvement district. The notice shall state the boundaries of the proposed business 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), 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, or 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, have not filed a petition with the planning commission protesting the proposed business improvement district or its proposed initial operating plan.
 - (e) The local legislative body has voted to adopt the proposed initial operating plan for the municipality.

- (2m)** A municipality may annex territory to an existing business improvement district if all of the following are met:
- (a)** An owner of real property used for commercial purposes and located in the territory proposed to be annexed has petitioned the municipality for annexation.
 - (b)** The planning commission has approved the annexation.
 - (c)** At least 30 days before annexation of the territory, the planning commission has held a public hearing on the proposed annexation. 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 territory proposed to be annexed to the business improvement district shall be sent by certified mail to all owners of real property within the territory proposed to be annexed. The notice shall state the boundaries of the territory proposed to be annexed.
 - (d)** Within 30 days after the hearing under par. (c), the owners of property in the territory to be annexed that would be assessed under the operating plan having a valuation equal to more than 40 percent of the valuation of all property in the territory to be annexed that would be assessed under the operating plan, using the method of valuation specified in the operating plan, or the owners of property in the territory to be annexed that would be assessed under the operating plan having an assessed valuation equal to more than 40 percent of the assessed valuation of all property in the territory to be annexed that would be assessed under the operating plan, have not filed a petition with the planning commission protesting the annexation.
- (3)**
- (a)** The chief executive officer shall appoint members to a business improvement district board to implement the operating plan. Board members shall be confirmed by the local legislative body and shall serve staggered terms designated by the local legislative body. The board shall have at least 5 members. A majority of board members shall own or occupy real property in the business improvement district.
 - (b)** The board shall annually consider and may make changes to the operating plan, which may include termination of the plan, for its business 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 business 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 business improvement district, including expenditures and revenues. The report shall include one of the following:
 - 1.** If the cash balance in the segregated account described under sub. (4) equaled or exceeded \$300,000 at any time during the period covered by the report, the municipality shall obtain an independent certified audit of the implementation of the operating plan.
 - 2.** If the cash balance in the segregated account described under sub. (4) was less than \$300,000 at all times during the period covered by the report, the municipality shall obtain a reviewed financial statement for the most recently completed fiscal year. The statement shall be prepared in accordance with generally accepted accounting principles and include a review of the financial statement by an independent certified public accountant.
 - (cg)** For calendar years beginning after December 31, 2018, the dollar amount at which a municipality is required to obtain an independent certified audit under par. (c) 1. and the dollar amount at which a municipality is required to obtain a reviewed financial statement under par. (c) 2. shall be increased each year by a percentage equal to the percentage change between the U.S. consumer price index for all urban consumers, U.S. city average, for the month of August of the previous year and the U.S. consumer price index for all urban consumers, U.S. city average, for the month of August 2017, as determined by the federal department of labor. Each amount that is revised under this paragraph shall be rounded to the nearest multiple of \$10 if the revised amount is not a multiple of \$10 or, if the revised amount is a multiple of \$5, such an amount shall be increased to the next higher multiple of \$10.
 - (cr)** The municipality shall obtain an additional independent certified audit of the implementation of the operating plan 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 and reviewed financial statements 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.

(4g) A municipality may convert a business improvement district under this section into a neighborhood improvement district under s. 66.1110 if an owner of real property that is subject to general real estate taxes, that is used exclusively for residential purposes, and that is located in the business improvement district petitions the municipality for the conversion. If the municipality approves the petition, the board shall consider and may make changes to the operating plan under s. 66.1110 (4) (b).

(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 percent 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 percent 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. (e).
- (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 percent 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 percent 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.

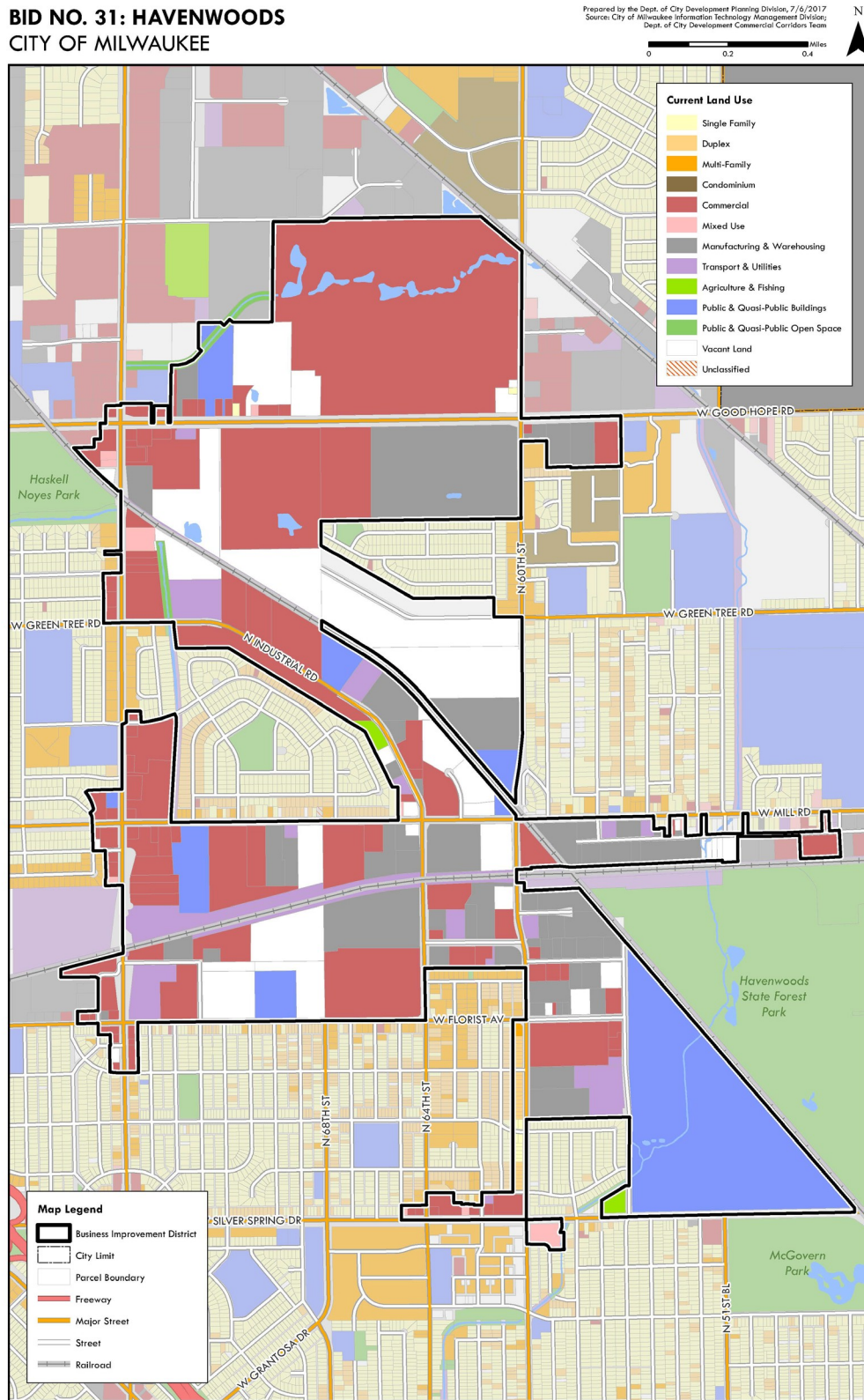
(5)

- (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.
- (d)** If real property that is specially assessed as authorized under this section is of mixed use such that part of the real property is exempted from general property taxes under s. 70.11 or is residential, or both, and part of the real property is taxable, the municipality may specially assess as authorized under this section only the percentage of the real property that is not tax-exempt or residential. This paragraph applies to a 1st class city.

History: 1983 a. 184; 1989 a. 56 s. 258; 1999 a. 150 s. 539; Stats. 1999 s. 66.1109; 2001 a. 85; 2017 a. 59, 70, 189.

BID NO. 31: HAVENWOODS
CITY OF MILWAUKEE

Prepared by the Dept. of City Development Planning Division, 7/6/2017
Source: City of Milwaukee Information Technology Management Division,
Dept. of City Development Commercial Corridors Team



Appendix C: Assessments

Taxkey	Address	BID Assessble Value	BID Assessment
1050002000	6808 W GOOD HOPE RD	\$ 292,400.00	\$ 400.00
1050011000	6200 W GOOD HOPE RD	\$ 2,618,100.00	\$ 3,141.72
1050014000	6150 W GOOD HOPE RD	\$ 49,300.00	\$ 400.00
1060001000	7500 W GOOD HOPE RD	\$ 1,086,500.00	\$ 1,303.80
1060013000	7420 W GOOD HOPE RD	\$ 499,000.00	\$ 598.80
1060052000	7120 W GOOD HOPE RD	\$ 352,800.00	\$ 423.36
1060081000	7100 W GOOD HOPE RD	\$ 617,800.00	\$ 741.36
1060082000	7030 W GOOD HOPE RD	\$ 461,600.00	\$ 553.92
1060091000	7200 W GOOD HOPE RD	\$ 269,700.00	\$ 323.64
1060092100	7132 W GOOD HOPE RD	\$ 9,300.00	\$ 400.00
1060101000	7240 W GOOD HOPE RD	\$ 170,900.00	\$ 400.00
1060111000	7334-7338 W GOOD HOPE RD	\$ 714,900.00	\$ 857.88
1060112000	7330 W GOOD HOPE RD	\$ 2,158,200.00	\$ 2,589.84
1069991116	7320 W GOOD HOPE RD	\$ 770,300.00	\$ 924.36
1069992121	7110 W GOOD HOPE RD	\$ 101,800.00	\$ 400.00
1069993211	7020 W GOOD HOPE RD	\$ 23,376.00	\$ 400.00
1069994211	7000 W GOOD HOPE RD	\$ 895,400.00	\$ 1,074.48
1069995211	6922 W GOOD HOPE RD	\$ -	\$ -
1070233000	7630 W GOOD HOPE RD	\$ 558,900.00	\$ 670.68
1079994210	7600 W GOOD HOPE RD	\$ 519,300.00	\$ 623.16
1180271000	6863 N 76TH ST	\$ 140,400.00	\$ 400.00
1180272000	6835 N 76TH ST	\$ 398,600.00	\$ 400.00
1180273000	6829 N 76TH ST	\$ 521,000.00	\$ 625.20
1189991200	7125 N 76TH ST	\$ 112,329.00	\$ 400.00
1189992200	7111 N 76TH ST	\$ 153,505.00	\$ 400.00
1189994223	7141 N 76TH ST	\$ 2,250,200.00	\$ 2,700.24
1189995111	7101 N 76TH ST	\$ 49,200.00	\$ 400.00
1190004000	7519 W GOOD HOPE RD	\$ 688,000.00	\$ 825.60
1190011000	7515 W GOOD HOPE RD	\$ 1,192,000.00	\$ 1,430.40
1190012000	7140 N 76TH ST	\$ 427,000.00	\$ 512.40
1190013000	7130 N 76TH ST	\$ 1,242,000.00	\$ 1,490.40
1190021000	6900-6902 N 76TH ST	\$ 178,000.00	\$ 400.00
1190031000	6920 N 76TH ST	\$ 868,400.00	\$ 1,042.08
1190032000	6930 N 76TH ST	\$ 592,600.00	\$ 711.12
1190041100	6940 N 76TH ST	\$ 252,600.00	\$ 303.12
1190042000	7000-R N 76TH ST	\$ 125,300.00	\$ 400.00
1190051000	7401 W GOOD HOPE RD	\$ 10,869,100.00	\$ 7,000.00
1190052000	7455 W GOOD HOPE RD	\$ 576,000.00	\$ 691.20
1190053000	7335 W GOOD HOPE RD	\$ 1,949,000.00	\$ 2,338.80
1199990120	7016 N 76TH ST	\$ 399,300.00	\$ 479.16
1199991211	7050 N 76TH ST	\$ 1,921,100.00	\$ 2,305.32
1199996212	7300 W GREEN TREE RD	\$ 4,053,700.00	\$ 4,864.44
1199996222	6800 N 76TH ST	\$ 2,465,900.00	\$ 2,959.08
1199997110	7003-R W GOOD HOPE RD	\$ 85,800.00	\$ 400.00

1209996110	6701 W GOOD HOPE RD	\$ 8,661,900.00	\$ 5,000.00
1209997111	6321 W GOOD HOPE RD	\$ 9,848,100.00	\$ 5,000.00
1210031000	5909 W GOOD HOPE RD	\$ 782,800.00	\$ 939.36
1210042000	5801 W GOOD HOPE RD	\$ 1,097,400.00	\$ 1,316.88
1210680000	5555 W GOOD HOPE RD	\$ 368,900.00	\$ 442.68
1210681000	5651 W GOOD HOPE RD	\$ 3,154,600.00	\$ 3,785.52
1219991123	5701 W GOOD HOPE RD	\$ 1,547,600.00	\$ 1,857.12
1400211000	6580 N INDUSTRIAL RD	\$ 698,700.00	\$ 838.44
1400212000	6540 N INDUSTRIAL RD	\$ 1,068,000.00	\$ 1,281.60
1400251000	6565 N INDUSTRIAL RD	\$ 455,000.00	\$ 546.00
1400253000	6471 N INDUSTRIAL RD	\$ 550,900.00	\$ 661.08
1400261000	6541 N INDUSTRIAL RD	\$ 50,100.00	\$ 300.00
1400262000	6501 N INDUSTRIAL RD	\$ 183,800.00	\$ 300.00
1400271000	6433 N INDUSTRIAL RD	\$ 115,800.00	\$ 300.00
1400272000	6418 W MILL RD	\$ 42,000.00	\$ 300.00
1400281000	6600 N INDUSTRIAL RD	\$ 4,070,700.00	\$ 4,884.84
1400291100	6660 N INDUSTRIAL RD	\$ -	\$ -
1400301000	6120 W MILL RD	\$ -	\$ -
1400312000	6500 N 62ND ST	\$ -	\$ -
1409985136	6425 N 60TH ST	\$ -	\$ -
1409989212	6480 N INDUSTRIAL RD	\$ 268,800.00	\$ 300.00
1409989220	6452 N INDUSTRIAL RD	\$ 180,000.00	\$ 300.00
1409995110	6010 W MILL RD	\$ -	\$ -
1410001112	6404 N 76TH ST	\$ 759,100.00	\$ 910.92
1410002110	6574 N 76TH ST	\$ 1,038,600.00	\$ 1,246.32
1410048100	6610 N 76TH ST	\$ 216,400.00	\$ 400.00
1410722110	6710-6732 N INDUSTRIAL RD	\$ -	\$ -
1410751100	6780 N. Industrial Road	\$ 945,300.00	\$ 1,134.36
1410752100	6750 N INDUSTRIAL RD	\$ 1,253,400.00	\$ 1,504.08
1410781100	6550 N 76TH ST	\$ 3,060,500.00	\$ 3,672.60
1410791000	6544 N 76TH ST	\$ 960,000.00	\$ 1,152.00
1410813000	6406-6440 N 76TH ST	\$ 6,800,000.00	\$ 6,800.00
1410814000	6442 N 76TH ST	\$ 2,837,500.00	\$ 3,405.00
1410821100	6633-6789 N INDUSTRIAL RD	\$ 18,997,000.00	\$ 5,000.00
1419980000	6730-R N INDUSTRIAL RD	\$ -	\$ -
1429984118	7630 W MILL RD	\$ -	\$ -
1530169000	7638 W WINFIELD AV	\$ 23,800.00	\$ 300.00
1530170100	6375 N 76TH ST	\$ 833,600.00	\$ 1,000.32
1530365100	6325 N 76TH ST	\$ 1,090,300.00	\$ 1,308.36
1530369100	6309 N 76TH ST	\$ 255,400.00	\$ 400.00
1530370100	6267-6275 N 76TH ST	\$ 260,268.00	\$ 400.00
1530431100	6030-6060 N 77TH ST	\$ 610,100.00	\$ 732.12
1539983110	6001 N 77TH ST	\$ 126,700.00	\$ 300.00
1539984100	7740 W FLORIST AV	\$ 229,300.00	\$ 300.00
1539986110	7626 W FLORIST AV	\$ 927,700.00	\$ 1,113.24
1539988111	6005 N 76TH ST	\$ 258,100.00	\$ 400.00

1539998100	6103 N 76TH ST	\$ 799,300.00	\$ 959.16
1540002100	6330 N 76TH ST	\$ 2,737,500.00	\$ 3,285.00
1540011111	6122 N 76TH ST	\$ 246,500.00	\$ 400.00
1540022100	7400 W DOUGLAS AV	\$ 369,000.00	\$ 369.00
1540041000	7320-7400 W FLORIST AV	\$ 1,315,900.00	\$ 1,579.08
1540042000	6000-6066 N 76TH ST	\$ 2,446,300.00	\$ 2,935.56
1540052000	7200 W FLORIST AV	\$ 156,800.00	\$ 400.00
1540053000	6150 N 73RD ST	\$ 26,200.00	\$ 300.00
1540061000	7000 W FLORIST AV	\$ 1,782,600.00	\$ 2,139.12
1540062000	6900 W FLORIST AV	\$ 250,900.00	\$ 400.00
1549970110	6130 N 76TH ST	\$ -	\$ -
1549973110	6170 N 76TH ST	\$ -	\$ -
1549979100	7000 W DOUGLAS AV	\$ 105,500.00	\$ 400.00
1549981110	6300 N 76TH ST	\$ 2,475,200.00	\$ 2,970.24
1549982100	7415 W MILL RD	\$ 353,500.00	\$ 424.20
1549983100	6366 N 76TH ST	\$ 439,300.00	\$ 527.16
1549984200	7427 W MILL RD	\$ 169,700.00	\$ 300.00
1549986110	6270 N 76TH ST	\$ 510,600.00	\$ 612.72
1549987111	6260 N 76TH ST	\$ 600,900.00	\$ 721.08
1549988121	6230 N 76TH ST	\$ 788,900.00	\$ 946.68
1549989110	7301 W MILL RD	\$ -	\$ -
1549989210	7323 W MILL RD	\$ 554,700.00	\$ 665.64
1549993100	7029 W MILL RD	\$ 2,184,400.00	\$ 2,621.28
1549994110	6937 W MILL RD	\$ 1,647,600.00	\$ 1,977.12
1549995110	6925 W MILL RD	\$ 484,400.00	\$ 581.28
1549995210	6913 W MILL RD	\$ 42,800.00	\$ 300.00
1549996100	6815 W MILL RD	\$ 307,900.00	\$ 307.90
1550301000	6601-6671 W MILL RD	\$ 3,732,000.00	\$ 4,478.40
1550404000	6143 N 60TH ST	\$ 1,356,500.00	\$ 1,627.80
1550411100	6555 W MILL RD	\$ 1,296,700.00	\$ 1,556.04
1550412100	6551 W MILL RD	\$ 1,667,900.00	\$ 2,001.48
1550421000	6121 W DOUGLAS AV	\$ 658,100.00	\$ 789.72
1550422000	6105 W DOUGLAS AV	\$ -	\$ -
1550431100	6180 N 64TH ST	\$ 147,200.00	\$ 400.00
1550442100	6301 W DOUGLAS AV	\$ 955,800.00	\$ 1,146.96
1550452110	6210 W DOUGLAS AV	\$ 555,700.00	\$ 666.84
1550461000	6200 N 64TH ST	\$ 957,600.00	\$ 1,149.12
1550462000	6300 W DOUGLAS AV	\$ 644,500.00	\$ 773.40
1559980000	6001 W MILL RD	\$ -	\$ -
1559983100	6101-6105 N 64TH ST	\$ 4,938,000.00	\$ 5,000.00
1559984111	6401 W MILL RD	\$ 31,000.00	\$ 300.00
1559984311	6353 N 64TH ST	\$ 940,800.00	\$ 1,128.96
1559984411	6305 N 64TH ST	\$ 997,500.00	\$ 1,197.00
1559985300	6239 N 60TH ST	\$ 86,500.00	\$ 300.00
1559987110	6242 N 64TH ST	\$ 444,000.00	\$ 532.80
1559989134	6060 W DOUGLAS AV	\$ 1,518,300.00	\$ 1,821.96

1559989135	6120 W DOUGLAS AV	\$ 1,259,700.00	\$ 1,511.64
1559998000	6242-ADJ N 64TH ST	\$ -	\$ -
1559999111	6301 W MILL RD	\$ 778,000.00	\$ 933.60
1560002110	5901 W BENDER CT	\$ 515,300.00	\$ 618.36
1560006100	5709 W BENDER CT	\$ 2,934,400.00	\$ 3,521.28
1560007100	5720 W BENDER CT	\$ 246,400.00	\$ 300.00
1560012100	5920 W BENDER CT	\$ 564,700.00	\$ 677.64
1560021100	6140 N 60TH ST	\$ 270,800.00	\$ 400.00
1560022100	6160 N 60TH ST	\$ 252,500.00	\$ 300.00
1560024111	6192 N 60TH ST	\$ 107,000.00	\$ 300.00
1560031000	5737 W MILL RD	\$ 779,600.00	\$ 935.52
1560041000	5225 W MILL RD	\$ 65,950.00	\$ 400.00
1560042000	5214 W WOOLWORTH AV	\$ 61,000.00	\$ 300.00
1560043000	5235 W MILL RD	\$ 11,700.00	\$ 300.00
1569964115	5501 W MILL RD	\$ 611,000.00	\$ 733.20
1569964120	5515 W MILL RD	\$ 39,400.00	\$ 300.00
1569964130	5521 W MILL RD	\$ 13,900.00	\$ 300.00
1569965113	5611 W MILL RD	\$ 756,600.00	\$ 907.92
1569965120	5611 W WOOLWORTH AV	\$ 767,400.00	\$ 920.88
1569973120	5629 W WOOLWORTH AV	\$ 396,700.00	\$ 396.70
1569980130	5101 W WOOLWORTH AV	\$ -	\$ -
1569981120	5111 W WOOLWORTH AV	\$ -	\$ -
1569993110	5407 W MILL RD	\$ 47,600.00	\$ 300.00
1569993211	5341 W WOOLWORTH AV	\$ 1,434,700.00	\$ 1,721.64
1569994121	5409 W WOOLWORTH AV	\$ 504,800.00	\$ 605.76
1569995110	5519 W WOOLWORTH AV	\$ 1,173,200.00	\$ 1,407.84
1569996114	5724 W FLORIST AV	\$ 195,600.00	\$ 300.00
1569996116	5714 W FLORIST AV	\$ 83,000.00	\$ 300.00
1569996117	5600-5610 W FLORIST AV	\$ 502,800.00	\$ 603.36
1569996122	5800 W DOUGLAS AV	\$ 483,400.00	\$ 580.08
1569996124	5700 W DOUGLAS AV	\$ 620,600.00	\$ 744.72
1569996126	5730 W DOUGLAS AV	\$ 298,400.00	\$ 300.00
1569996132	5711 W DOUGLAS AV	\$ 442,600.00	\$ 531.12
1569996133	5632 W FLORIST AV	\$ 100,000.00	\$ 300.00
1569996135	5607 W DOUGLAS AV	\$ 638,700.00	\$ 766.44
1569996138	5635 W DOUGLAS AV	\$ 525,200.00	\$ 630.24
1569996141	6030 N 60TH ST	\$ 1,431,900.00	\$ 1,718.28
1569996143	6000 N 60TH ST	\$ 545,400.00	\$ 654.48
1569996144	5800 W FLORIST AV	\$ 19,000.00	\$ 300.00
1569996145	5734 W FLORIST AV	\$ 163,400.00	\$ 300.00
1569996148	5529 W DOUGLAS AV	\$ 98,400.00	\$ 300.00
1569996149	5500 W FLORIST AV	\$ 838,400.00	\$ 1,006.08
1569996157	5500 W DOUGLAS AV	\$ 642,400.00	\$ 770.88
1569996163	5600 W DOUGLAS AV	\$ 594,700.00	\$ 713.64
1569996164	5901 W DOUGLAS AV	\$ 526,300.00	\$ 631.56
1569996165	5777 W DOUGLAS AV	\$ 931,600.00	\$ 1,117.92

1569997100	6360 N 60TH ST	\$	1,373,500.00	\$	1,648.20
1729991000	5300 W SILVER SPRING DR	\$	-	\$	-
1730301000	5901 N 55TH ST	\$	29,200.00	\$	300.00
1730321111	5873 N 55TH ST	\$	864,800.00	\$	1,037.76
1730322000	5889 N 55TH ST	\$	68,100.00	\$	300.00
1730331000	5515 W FLORIST AV	\$	599,300.00	\$	719.16
1730332000	5933 N 55TH ST	\$	704,500.00	\$	845.40
1739992111	5960 N 60TH ST	\$	1,706,900.00	\$	2,048.28
1739993111	5840-5850 N 60TH ST	\$	931,200.00	\$	1,117.44
1739994110	5880 N 60TH ST	\$	-	\$	-
1739994124	5915 N 55TH ST	\$	246,100.00	\$	300.00
1740001000	6000 W CARMEN AV	\$	-	\$	-
1740002000	6012 W CARMEN AV	\$	-	\$	-
1740005000	6001 W CARMEN AV	\$	-	\$	-
1740006000	6013 W CARMEN AV	\$	-	\$	-
1740008000	5733 N 60TH ST	\$	-	\$	-
1740139000	5923-5925 N 60TH ST	\$	-	\$	-
1740140000	5917-5919 N 60TH ST	\$	-	\$	-
1741004000	5663-5665 N 60TH ST	\$	-	\$	-
1741005000	5657-5659 N 60TH ST	\$	-	\$	-
1741006000	5649-5651 N 60TH ST	\$	-	\$	-
1749999000	6330 W SILVER SPRING DR	\$	397,100.00	\$	400.00
1750201110	7525 W FLORIST AV	\$	173,900.00	\$	400.00
1750205100	5950-5954 N 76TH ST	\$	195,500.00	\$	400.00
1750207110	5902-5940 N 76TH ST	\$	2,209,500.00	\$	2,651.40
1750537110	5656 N 76TH ST	\$	796,600.00	\$	955.92
1760299000	5903 N 76TH ST	\$	133,900.00	\$	400.00
1760301110	5925 N 76TH ST	\$	1,406,000.00	\$	1,687.20
1760365111	7605 W FLORIST AV	\$	326,700.00	\$	400.00
1760365112	5959-5969 N 76TH ST	\$	72,000.00	\$	400.00
1902131000	5821-5865 W SILVER SPRING DR	\$	2,261,200.00	\$	2,713.44
1902132000	5739 W SILVER SPRING DR	\$	1,290,100.00	\$	1,548.12
1902133000	5733 W SILVER SPRING DR	\$	47,800.00	\$	400.00
1549976000	7216 W DOUGLAS AV	\$	6,800.00	\$	300.00
1549978111	7240 W DOUGLAS AV	\$	104,600.00	\$	300.00
1549991121	7111-7125 W MILL RD	\$	3,939,000.00	\$	4,726.80
1550441000	6333 W DOUGLAS AV	\$	552,200.00	\$	662.64
1559983200	6161 N 64TH ST	\$	3,517,699.00	\$	4,221.24
1560003100	5801 W BENDER CT	\$	629,900.00	\$	755.88
1740769000	6432 W SILVER SPRING DR	\$	61,050.00	\$	300.00
1740770000	6414-6426 W SILVER SPRING DR	\$	160,080.00	\$	300.00
1740771000	6410 W SILVER SPRING DR	\$	622,700.00	\$	747.24
1741017112	5620 N 62ND ST	\$	51,700.00	\$	300.00
1741017113	6000 W SILVER SPRING DR	\$	1,853,030.00	\$	2,223.64

1741020110	6120 W SILVER SPRING DR	\$	447,000.00	\$	536.40
1749990100	6350 W SILVER SPRING DR	\$	1,147,500.00	\$	1,377.00
1749995100	6204 W SILVER SPRING DR	\$	355,000.00	\$	426.00
1749996110	6220 W SILVER SPRING DR	\$	178,193.00	\$	300.00
					224,486.80



Board Member	Title	Property Owner/Occupant	Start Date	End Date
David Mitchell	Member	8301 W. Parkland Court	02/16/2018	02/16/2021
Julie McNamara	Member	5519 W. Woolworth	05/26/2016	05/26/2021
Keth Raskin	Member	6301 W. Douglas	04/08/2016	04/08/2021
Steven Hentzen	Member	6937 W. Mill Road	11/10/2014	11/10/2022
Lisa Schefsky	Member	5611 W. Woolworth Ave.	01/21/2020	01/21/2023
John Erdmann	Member	6930 N. 76th St.	03/03/2020	03/01/2023

Business Improvement District #31 September 2019- September 2020 Annual Report

Financial Relationships

BID #31 contracts with Havenwoods Economic Development Corporation to carry out the BID's initiatives. Both organizations work synergistically to deliver economic and community development strategies throughout the Havenwoods community. There is overlap of Board members for the BID and HEDC to ensure inclusivity. We also have overlap of Board representation of NID Board members and HEDC to ensure that initiatives are mutually supported and complementing one another.

The BID has no employees but assists in staffing four full time employees. During the summer the BID subsidizes seasonal employees.

Property Values and Economic Development

The total property value for the Havenwoods BID for 2021 \$208,194,900.00

Core Programs:

Business Grants

BID #31 implements three grant programs to include sign grants, landscape grants and façade grants. In 2020 we will have awarded \$5,000.00 in façade grants. We have 3 new developments/expansions on the horizon for 2020 and 2021.

BID District Beautification and Capital Improvements:

Our BID continues to fund the planting installations and maintenance for N. 76th St and W. Silver Spring Drive. We also fund the planting and maintenance of 26 planters in the neighborhood.

The Business Improvement District has invested over this reporting period a sum of \$32,658.46 in infrastructure maintenance for the retail corridors. These improvements include boulevard landscape maintenance, holiday lights, and civic planters.

This year the BID has introduced public art into our business districts in the form of four murals to be completed by October 31, 2020. Partnerships in this endeavor include NID #9, HEDC, Mary Nohl Foundation, and American Family Insurance.

Marketing and Promotion

During this COVID time we took advantage of the situation and embarked on a new branding and marketing campaign to be unveiled 4th quarter of 2020. This will include the launching of a new website, a new name for our organization and a new logo that will better represent the work that we do.

Workforce Development

BID #31 has initiated an incumbent worker training and upskilling program through a partnership with Milwaukee Area Technical College. We have created a satellite training center within the BID corporate offices to upskill incumbent workers in the following: software proficiencies, manufacturing safety certifications, management skills, and leadership training. To date we have trained approximately 45 incumbent workers. The long term goal is to put entry and middle level employees on an upward trajectory thereby making entry level positions available to employees in the neighborhood. During this timeframe the BID invested over \$8000.00 in upskilling low-wage earning incumbent workers in an effort to increase their wages.

The BID hosts three Human Resource Round Table lunch and learns per year to bring together workforce development professionals to share best practices, learn about services available for workforce recruitment and assistance and to provide a space for networking among the companies.

Earn & Learn

The BID funded one supervisory position that employed 7 Havenwoods youth via the Earn and Learn program. It also provided subsidized funding for an additional 4 Earn and Learn youth from the Havenwoods community to serve as NID #9 Ambassadors. This is an example of the synergy that takes place between residents and business owners.

Employer Assisted Homeownership Program:

The BID continues to grow our Employer Assisted Homeownership Program. We currently have partnered with five companies in Havenwoods participating in our EAH program. The BID provides down payment assistance to employees that are interested in purchasing a home in Havenwoods. Since 2018 148 employees have attended our “Lunch and Learn” homeownership introductory meetings, a minimum of 20 have attended home buying workshops and we had nine home purchases with the majority of purchased taking place on the City’s far northwest side. Total BID dollars for this reporting time period was \$6,030.00 these dollars also leveraged an additional 50% match from the employer. In some cases depending on the company, an employee can gather up to \$4500.00 in down payment assistance.

Business Assistance:

The BID continues to serve as an advocate for businesses making better connections with city services such as Dept. of Public Works, Department of Neighborhood Services and the Milwaukee Police Department. The BID also hosts Business Crime and Safety meetings to discuss crime prevention techniques and police services for our business corridors.

Community Development:

As part of the administrative fee that the BID pays to its partnering CDC, Havenwoods Economic Development Corporation they are investing heavily in the surrounding community to build a sustainable neighborhood and a business friendly community. This investment is in the form of assisting in the operational costs of running the CDC. These are some of the programs that the BID currently invests in:

Crime Prevention:

The current CDBG funding for crime prevention initiatives covers approximately 50% of the cost of delivering crime prevention initiatives to the Havenwoods community. The BID subsidizes through its admin fee crime prevention efforts for the residential community to include block watches, landlord compacts, and community organizing.

Resident Engagement:

The BID also subsidizes community development in terms of resident engagement, special community events, home buying tours, and NID #9 activities via the HEDC admin fee. The BID also provides meeting space for resident engagement activities.

Havenwoods Business Improvement District #31

10/01/20

Balance Sheet

Accrual Basis

As of October 1, 2020

	<u>Oct 1, 20</u>
ASSETS	
Current Assets	
Checking/Savings	
BMO Harris Bank 6442	174,018.11
Petty Cash	300.00
Total Checking/Savings	<u>174,318.11</u>
Accounts Receivable	
Accounts Receivable	4,800.00
Total Accounts Receivable	<u>4,800.00</u>
Other Current Assets	
Prepaid Expense	
Prepaid Insurance 2021	223.50
Prepaid Insurance 2020	528.51
Prepaid Expense - Other	1,000.00
Total Prepaid Expense	<u>1,752.01</u>
Total Other Current Assets	<u>1,752.01</u>
Total Current Assets	180,870.12
Fixed Assets	
Furniture and Equipment	284.93
Total Fixed Assets	<u>284.93</u>
Other Assets	
Security Deposits Asset	141.56
Total Other Assets	<u>141.56</u>
TOTAL ASSETS	<u><u>181,296.61</u></u>
LIABILITIES & EQUITY	
Equity	
Unrestricted Net Assets	107,338.82
Net Income	73,957.79
Total Equity	<u>181,296.61</u>
TOTAL LIABILITIES & EQUITY	<u><u>181,296.61</u></u>

Havenwoods Business Improvement District #31

Profit & Loss

10/01/20

September 1, 2019 through October 1, 2020

Accrual Basis

	<u>Sep 1, '19 - Oct 1, 20</u>
Ordinary Income/Expense	
Income	
Investments	87.50
Other Types of Income	216,715.80
Total Income	<u>216,803.30</u>
Expense	
Contract Services	35,216.05
Earn & Learn Program	4,669.81
Facilities and Equipment	2,335.01
Operations	3,586.23
Other Types of Expenses	102,183.49
Projects & Programs	38,507.55
Total Expense	<u>186,498.14</u>
Net Ordinary Income	30,305.16
Other Income/Expense	
Other Expense	
Ask My Accountant	0.00
Total Other Expense	<u>0.00</u>
Net Other Income	0.00
Net Income	<u><u>30,305.16</u></u>