

BUSINESS IMPROVEMENT DISTRICT #11
BRADY STREET BUSINESS AREA
2016 OPERATING PLAN

August 15, 2015

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OPERATING PLAN

I. INTRODUCTION

In 1984, the Wisconsin legislature created s. 66.608 of the Statutes enabling cities to establish Business Improvement Districts (BIDS) upon the petition of at least one property owner within the proposed district. 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." Upon petition from property owners within the Brady Street Business District, the Common Council of the City of Milwaukee, on September 28, 1993, by Resolution File Number 930854, created BID No. 11 (Brady Street Business Area) and adopted its initial operating plan.

Section 66.608(3) (b), Wisconsin Statutes requires that a BID board "shall annually consider and make changes to the operating plan.....the board shall then submit the operating plan to the local legislative body for approval." The Board of BID No.11 (Brady Street Business Area) submits this operating plan in fulfillment of statutory requirement.

This plan proposes a continuation and expansion of the activities described in the initial (JULY 1993) BID operating plan. Therefore, it incorporates by reference the earlier plan as adopted by the Common Council. In the interest of brevity, this plan emphasizes the elements which are required by section 66.608, Wis. Stats., the proposed changes for 2016, and does not repeat the background information which is contained in the earlier plan

II. DISTRICT BOUNDARIES

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

III. PROPOSED OPERATING PLAN

A. Plan Objectives

1. The Business Improvement District has been used to finance Brady Street property owners' share of "streetscape" improvements in the public sidewalk area.

The objectives of this streetscape project were as follows:

- a. To protect and reinforce the street's historic character
 - b. To act as a catalyst for private investment
 - c. To improve the overall appearance and image of the street, including a public art project which was done to enhance and encourage pedestrian traffic.
 - d. To enhance safety and security by increasing the amount of street lighting.
2. To organize the commercial interests on the street in order to facilitate joint economic development.
 3. Work with area organizations, schools and churches to solidify, enhance and strengthen the residential base of the neighborhood.
 4. Work on creating and enhancing infrastructure to augment commercial connections to neighborhoods by facilitating and encouraging non- automotive modes of transportation.

B. Proposed Activities

Principal activities to be undertaken by the district will include:

1. Continue to monitor, maintain and repair the streetscape.
2. Monitor the installation and implementation of streetscape improvements, and continue to plan for gateways to the district.
3. Review and update strategic plan for expanding retail opportunities West of Humboldt Avenue
4. Continue to market and promote the area through joint advertising, installation of banners, kiosk signage, sponsorship of events and seasonal decorations.

5. Continue to investigate and study parking options and alternatives for patrons of the commercial district.
6. To own, operate and develop real estate by itself or in collaboration with a public or private entity, determined by majority vote of the Board that can or will be used to further any of its Plan Objectives as stated above.

C. Proposed Expenditures:

Capital Maintenance and repair	13,000.00
Maintenance / Upkeep	25,500.00
Advertising, Promotions, Events, & Seasonal Decorations:.....	53,380.00
Direct Operating Expenses	16,020.00
Consultant / Staff	55,000.00

Total Expenditures: \$162,900.00

Proposed Income:

BID Assessments	\$130,000.00
Interest.....	300.00
Other Income	23,600.00

Total Income: \$153,900.00

**Board is committed to holding special assessments level and will use projected 2015 reserves to fund shortfall.

D. Financing Methods:

It is proposed that the City of Milwaukee and the district jointly and cooperatively fund the streetscaping. The district's share of the cost of the streetscaping and the operating expenses of the district will be funded by special assessment on the properties within the district.

The district will enter into a development agreement with the City of Milwaukee. The agreement will include the issuing of municipal bonds for the district's portion of the cost. The district shall pay each year for the term of the bonds, the amount necessary for principal, interest and other expenses on its portion of the cost.

The development agreement will constitute a long term commitment and the district will not be terminated until all repayments to the City have been made and adequate provision is made for the operation and management of the improvements financed through the district. The development agreement will be in addition to this operating plan. Adoption of the development agreement by both the City of Milwaukee and the BID Board will be necessary.

Allocation of the district's annual expenses will be based on each individual property's assessed valuation as a percentage of the district's total assessed valuation. It is proposed to raise \$130,000 in 2016 through BID assessments. (see Appendix B). The BID Board will have the authority and responsibility to prioritize expenditures and to revise the budget as necessary to match the funds actually available.

E. Bid 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 and to ensure district compliance with the provisions of applicable statutes and regulations.

The Bid Board is structured and operates as follows:

1. Board size - Eleven
2. Composition - At least seven members shall be owners or occupants of property within the District. Any non-owner or non-occupant appointed to the Board shall be a resident of the City of Milwaukee. The Board shall elect its Chairperson from among its members.
3. Term - Appointments to the Board shall be for a period of three years.
4. Current Board: Alaa Musa - Chair
Julilly Kohler - Vice-Chair
Pat Suminski – Secretary / Treasurer

Leroy Buth - Director
Mari Cucunato - Director
Josephine Fazio – Director
Pamela Glorioso - Director
Salvatore (Ted) Glorioso – Director
Michael Lee – Director
Teresa Morton - Director
Teri Regano - Director
Marlene Garacci – Recording Secretary

5. Compensation - None
6. Meetings - All meetings of the Board shall be governed by the Wisconsin Open Meetings Law.
7. Record Keeping - Files and records of the Board's affairs shall be kept pursuant to public records requirements.
8. Staffing - The Board may employ staff and/or contract for staffing services pursuant to this plan and subsequent modifications thereof.
9. Meetings - The Board shall meet regularly, at least twice a year. The Board has adopted rules of order (by-laws) to govern the conduct of its meetings.

IV. METHODS OF ASSESSMENT

A. Assessment Rate and Method

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, an assessment on the assessed value of the property was selected as the basic assessment methodology for this BID.

As of January 1, 2015, the property in the district has a total assessed value of approximately \$61,709 million. Appendix B shows the projected BID assessment for each property 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 66.608(1)(f)lm: 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 66.608(5)(a): Property known to be used exclusively for residential purposes will not be assessed; such properties will be identified as BID Exempt Properties in Appendix B, as revised each year.
3. In accordance with the interpretation of the City Attorney regarding State Statute 66.608(1)(b), property exempt from general real estate taxes have been excluded from the district. Privately owned tax exempt property which is expected to benefit from district activities may be asked to make a financial contribution on a voluntary basis.

V. RELATIONSHIP TO MILWAUKEE COMPREHENSIVE PLAN AND ORDERLY DEVELOPMENT OF THE CITY

A. Area Planning and Zoning

No changes in District planning or zoning have occurred since adoption of the initial operating plan in 1993.

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 has played 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 which 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. 66.608(3)(c) of the BID law.
5. Provide the Board, through the Tax Commissioner's Office on or before June 1st of each Plan year, with the official City records on the assessed value of each tax key number with the district, as of January 1st 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 Operating Plan.

Section 66.608(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, it focuses upon activities, and information on specific assessed values, budget amounts and assessment amounts are based on anticipated 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. NOTE: Amended Improvements List approved by the Common Council March 12, 2001 – See Appendix D.

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 66.608 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 of 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 66.608(3)(b).

APPENDICES

- A. District Boundaries
- B. Projected Assessments
- C. Description and Cost of Streetscape Project
- D. Amended Improvements List

APPENDIX C

DESCRIPTION AND COST OF STREETScape PROJECT

The street improvements will include replacing concrete walk, driveway approaches, curb and gutter. Adding Milwaukee Harp pedestrian level lights, Milwaukee Lantern (acorn fixture) overhead lights, street trees with grates, information kiosks, trash receptacle, benches and planters. A public art project will incorporate medallions with symbols depicting historic facts about the area. These medallions will be placed in the tree border area which will consist of pressed and formed decorative concrete.

PROJECT COSTS

BID	\$582,000
MATCHING CITY FUNDS	\$500,000
CAPITAL IMPROVEMENT/PAVING	\$454,000
TOTAL	\$1,536,000

NOTE: BID #11 borrowed funds from City of Milwaukee. The final loan payment was made in 2009. City of Milwaukee has been paid in full.

APPENDIX D

Business Improvement District #11
Brady Street Business Area
Amended Improvements List – Approved by Common Council March 12, 2001

Improvements List

The following improvements will be located in the public right-way within the area illustrated by the attached map. All improvements will be owned by the City of Milwaukee.

A. BID Specific Improvements:

1. Sandblasted artwork in the stamped concrete area.
2. Special street furniture or other items which may be placed in the street right of way at the BID expense including but not limited to planters, bicycle racks, trash receptacles (non City standard), information kiosks, signing, and accent lighting.
3. Stamped concrete sidewalk pavement 2.5 feet in width parallel to the curb line.
4. East/west curb pushouts at four intersections.
5. Sidewalk planters at curb pushout locations.
6. Tree grate and guards in the streets commercial area.
7. Installation of bike racks.
8. Planning and upgrade of East End Brady Street pedestrian and bike path.
9. Planning and upgrade of West End Brady Street pedestrian and bike path.
10. Planning and construction of Marsupial Bridge.
11. Planning and construction of Under Bridge Pocket Park.
12. Planning and construction of Lift Station Path and bus shelter.
13. Planning and construction of Brady Street Triangle (Northeast corner Brady St. & Water St.)
14. Public Art in specified areas.
15. Repair specialty stamped concrete crosswalks.

B. City Standard Improvements

1. Street trees.
2. Pedestrian harp lights with accessory outlets.
3. New sidewalks, curbs and gutters.
4. Repaved Brady Street.

BID #11 (Brady Street) Board Member Sheet

Board Organization: 11 members; @ least 7 members shall be owners/occupants of property w/in district; a non-owner/occupant shall be a city resident; Term = 3 years

<u>Board Member</u>	<u>Title</u>	<u>Start Date</u>	<u>End Date</u>
Alaa Musa	Member	3/13/2014	3/13/2017
Josephine Fazio	Member	**reappointed 9/1/2015; no Oath taken	
Julilly Kohler	Member	2/13/2013	2/13/2016
Leslie Montemurro	Member	*appointed 9/1/2015; no Oath taken	
Mari Cucunato	Member	6/9/2014	6/9/2017
Michael Lee	Member	3/6/2014	3/6/2017
Pamela Glorioso	Member	4/17/2014	4/17/2017
Pat Suminski	Member	3/10/2014	3/10/2017
Salvatore Glorioso	Member	4/29/2014	4/29/2017
Teresa Morton	Member	4/12/2013	4/12/2016
Teri Regano	Member	6/19/2012	6/19/2015

